Non-Agency Provider Guide

Ohio Department of Medicaid (ODM) Electronic Visit Verification (EVV) Program

April 2022

v 2.0

Sandata

While the instructional materials contain the general functionality of the system, set up is contingent on agency/payer directed configuration. When available, please refer to the agency/payer specific training materials to obtain information on the workflow and the applicable functionality.

Table of Contents

Course Duration

This course is divided into modules. The estimated time to complete one module is listed at the beginning of the module chapter. Modules vary in length, between twenty minutes and two hours.

Performance Objectives

- Navigate Sandata EVV.
- Describe how to order EVV devices for clients.
- Explain how to request the return of an EVV device for a client.
- Use the Data Entry Module to:
  - Manually input and maintain clients
  - Delete/Reactivate clients
- Explain the purpose and basic functionality of mobile visit verification using Sandata Mobile Connect (SMC) and Telephonic Visit Verification (TVV).
- Use SMC and TVV to switch services during a visit.
- Use the Visit Maintenance module to manage, correct visit exceptions and add manual visits, as necessary.
- Know the difference between Daily and Date Range reports.
- Run Daily, Date Range, and Security reports.

Conventions Used in this Document

Convention	Description
Bold Text	Used to alert a selection to be made or name of a field.
	Used to indicate an external tool or support (e.g. reference information) for instructors or participants.
	Used to indicate workflow.
	Use to highlight any risk management points.
	Used to highlight a key point of which the user should take notice.
	Used to indicate a tip and/or shortcut.

1 Program Overview

Module Time

15 minutes

This lesson introduces the Ohio Department of Medicaid's Electronic Visit Verification (EVV) program. It provides an overview of the benefits and its core functionality.

Module Objectives

After completing this lesson, you will be able to:

- describe the 21st Century Cures Act; and
- describe the ODM program objectives.

Key Terminology

Term/Acronym	Definition
Aggregator	Central data store for Sandata EVV and alternate data collection EVV systems.
Alternate EVV System	Any EVV system that is not Sandata's.
BYOD	Bring Your Own Device.
DAS	Department of Administrative Services.
DODD	Department of Developmental Disabilities.
DCW	Direct Care Worker.
EVV	Electronic Visit Verification.
Fee-for-Service (FFS)	A payment model under which a provider is paid directly by ODM, ODA, or DODD.
GPS	Global Positioning System.
MCO	Managed Care Organization.
MITS	Medicaid Information Technology System – Ohio's claims adjudication system.
MVV	Sandata Mobile Visit Verification. The name of Sandata's mobile application used at the start of Phase 1 of the EVV. Moving forward, this will be referred to as Sandata Mobile Connect (SMC).
ODA	Ohio Department of Aging.
ODM	Ohio Department of Medicaid.
ODM EVV	All parts of Sandata's EVV solution for Ohio Department of Medicaid —provider portal, EVV technologies and Aggregator.
OHCW	Ohio Home Care Waiver.
PDN	Private Duty Nursing.
PIMS	PASSPORT Information Management System.
Sandata EVV	Sandata's Electronic Visit Verification System.
Sandata Mobile Connect (SMC)	Sandata's Mobile Visit Verification application, formally known as MVV in Phase 1.

Telephonic Visit Verification (TVV)	System used to record visit data and verification when SMC is not available.

Introduction

Congress established a January 1ST, 2021 requirement for all states to use an EVV system, in accordance with the 21st Century Cures Act.

EVV is an electronic system that verifies when provider visits occur and documents the precise time services begin and end. ODM will provide the Sandata EVV system free-of-charge for all providers.

- Promote quality outcomes for clients (Quality of Care)
- Ensure the health and welfare of clients choosing to receive long-term services and support where they live, or otherwise receive care in the community
- Reduce billing errors and contain costs (Program Integrity)
- Improve payment accuracy by using technology to match data on claims with data in service documentation (e.g., time and duration of visit)

Please visit ODM's website for the most up to date services subject to EVV requirements.

2 System Overview

Module Time
40 minutes
This lesson demonstrates how to log in to Sandata EVV.

Module Objectives
After completing this lesson, you will be able to:

- access and log in to Sandata EVV;
- reset passwords;
- navigate Sandata EVV (with/without Americans with Disabilities Act (ADA) support); and
- define common functions within Sandata EVV.

Key Terminology

Term	Definition
Americans with Disabilities Act (ADA)	The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability
Job Access with Speech (JAWS)	Job Access with Speech is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or by a refreshable Braille display

Browser Requirements

Sandata supports the current and prior major releases of Microsoft Internet Explorer, Mozilla Firefox and Google Chrome on a rolling basis. We then discontinue support for the third-most recent major release. This policy to support modern browsers allows us to take advantage of the most recent efficiencies in the browsers to maximize the user experience and ensure our solutions are running on the most recent security and performance updates.

Overview

Sandata EVV consists of seven (7) sections:

- *Navigate Modules*
- *Security*
- *Data Entry*
- *Dashboard*
- *Visit Maintenance*
- *Reports & Exports*
- *Group Visits*

Log-in Screen

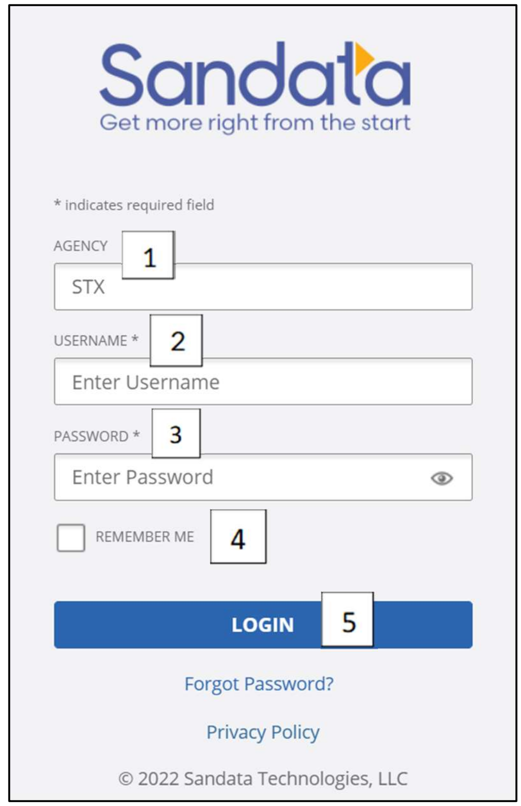
Logging in to Sandata EVV

System security requires that you log on using the URL (https://evv.sandata.com) provided in the Welcome Kit. The Welcome Kit is provided upon completion of training through the eTRAC Portal. Follow the steps below to log in to Sandata EVV for the first time.

1. **AGENCY** – Example: STX#### (#### = account number)
2. **USERNAME** – The username is the email address on file with ODM (username is not case sensitive).
3. **PASSWORD** – Must be at least 12 characters long, have at least one upper case, one lower case letter, one numeric character and one "special" character (@#$%^). The password is case sensitive.

> Clicking the "eye" icon will display/hide the password information entered.

4. **REMEMBER ME** – When enabled, this checkbox will preserve the last Agency and Username entered.
5. **LOGIN** – gain access to Sandata EVV.



> **REMEMBER ME** – When checked, preserves the last username entered.

EVV Lock Out

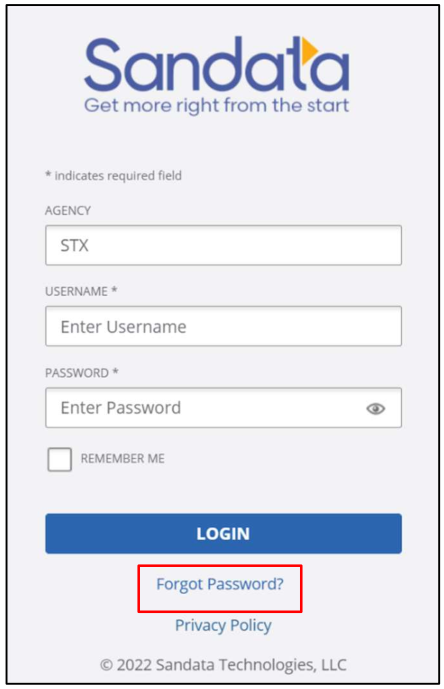
A user is locked out of the system after five (5) unsuccessful login attempts. If a Non-Agency Provider is locked out, then the user must call the EVV Provider Hotline at (855) 805-3505 to unlock their account.

Resetting a Forgotten Password

Passwords are valid for 60 days. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

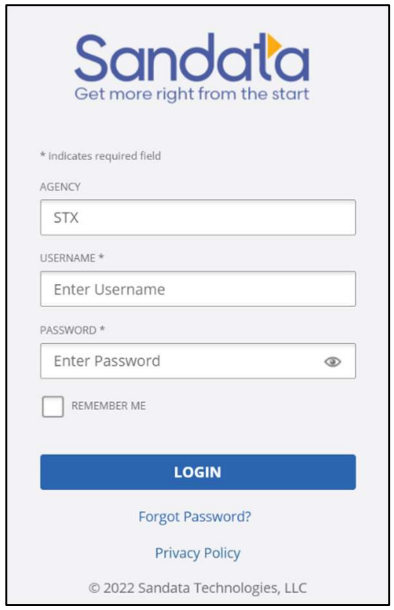
There can be times when a password is forgotten and it is necessary to reset the password (e.g., a new user forgets what they set as their password during the initial login process).

1. Click **Forgot Password?** A window opens to enter the email address to receive a temporary password.

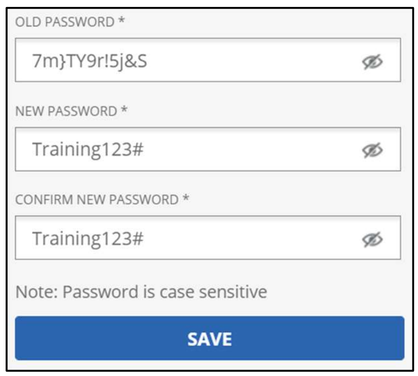


2. Enter the **EMAIL ADDRESS** (username) used to log in.

3. Click **RESET PASSWORD**. The system sends an email with a temporary password.
4. Login using your Agency, Username, and temporary password.



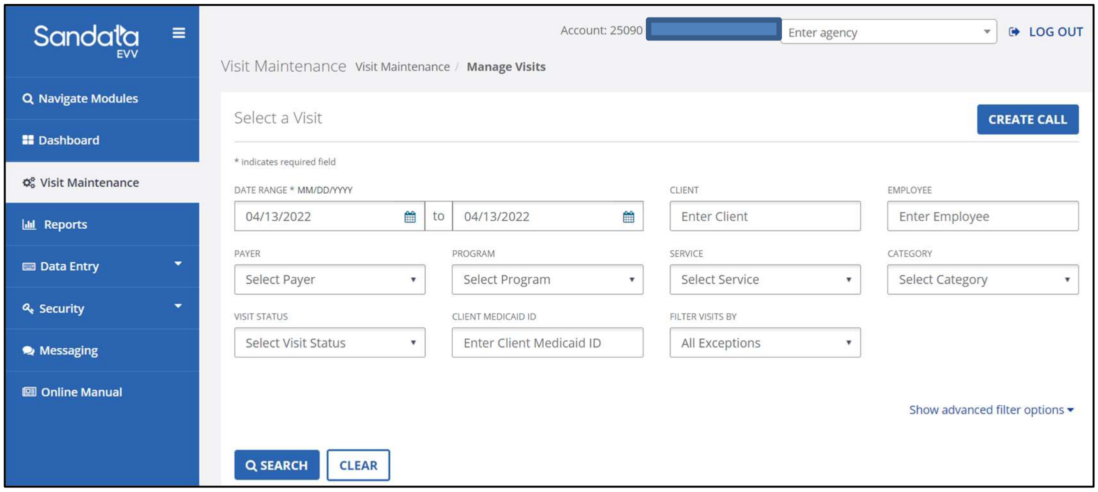
5. Enter the temporary password in the **OLD PASSWORD*** field.
6. Create and enter a new password in the **NEW PASSWORD*** field.
7. Re-enter the password in the **CONFIRM NEW PASSWORD*** field.



8. Click **SAVE**.

Navigating Sandata EVV

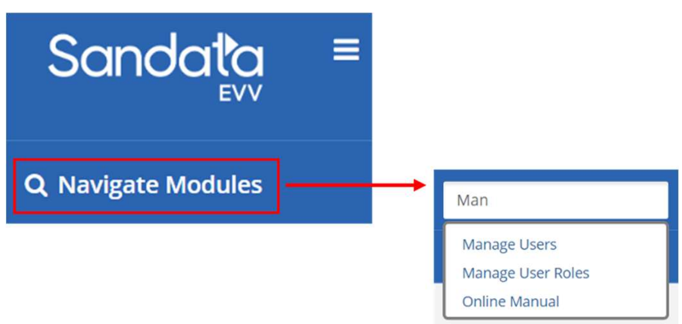
After successful login, the *Visit Maintenance* screen displays.



ADA Navigation Support

Sandata EVV can be navigated using only the keyboard. It is also Job Access with Speech (JAWS) Reader compliant. Below is the *Visit Maintenance* screen. The *Visit Maintenance* screen displays immediately after log in.

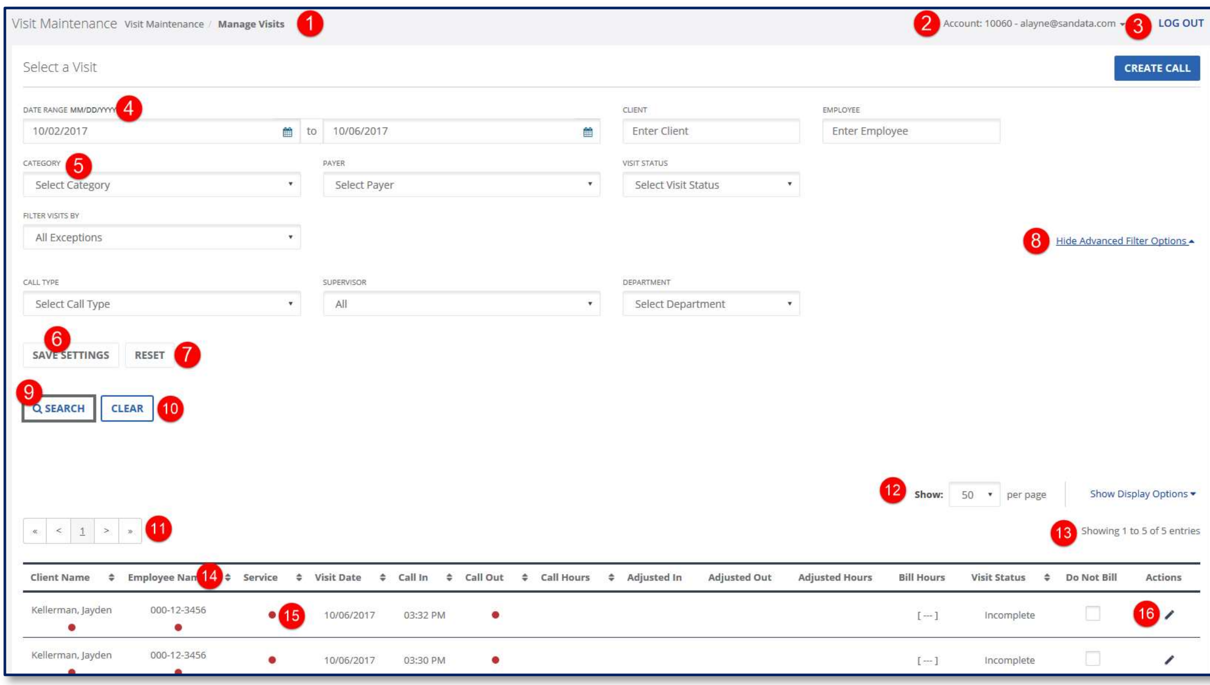
1. Using the <**Tab**> key to move through the system, the links below display individually. They allow you to skip the navigation options and begin with the main content.
2. Tab **Navigate Modules** on the *Navigation* panel opens the **Navigate Modules** field. This allows users to jump between screens by typing the name of the screen in the field. A link to the screen displays below the field. Click the link to navigate to the page.



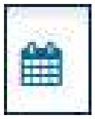
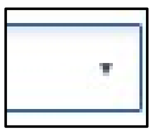
3. To accommodate users that require more time, when a user remains idle for 15 (fifteen) minutes, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.

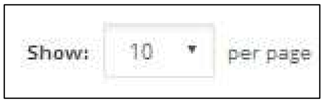
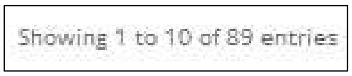
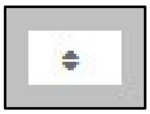
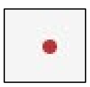
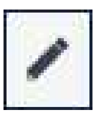
Common Functions of Sandata EVV

This section describes common functions within Sandata EVV. Here is an example with the different items that are typically displayed.



Item		Name	Description
1.		Navigation Path	System and which screen is displayed.
2.		Account and User Display	Displays the account the user is logged into and the username/email address of the user currently logged in. For more about these fields, see the section Sandata Header.
3.		Log Out Button	Logs the user out of the system and displays the log-in screen.

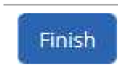
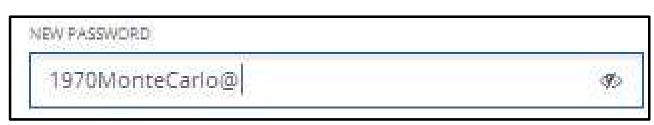
Item		Name	Description
4.		Calendar Icon	Clicking this icon displays a calendar from which the user selects a date. 
5.		Show List Icon	Located in list fields, clicking this icon displays the list. 
6.		Save Settings Button	When advanced filter settings are displayed, this button will save selected search fields so that they will be displayed again at the next user login.
7.		Reset Button	If search settings have been saved, this button will clear them.
8.		Show/Hide Advanced Filter Options	On screens enabled for searches, clicking this link shows or hides any advanced filters that are available.
9.		Search Button	Executes a search.
10.		Clear Button	Clears a search field or series of search fields.
11.		Page Listing	This provides a button to go to the start and end of a list, along with the ability to display any individual page of the list.

Item		Name	Description
12.		Number of Items per Page Setting	This setting allows users to select how many rows of a list are displayed on each page.
13.		Page Contents	This results display is shown on pages on which there are either lists or search results. Located at the top and bottom of each page, this results display shows the list entries displayed on each page, as well as the total number of rows in the list.
14.		List Sorting Icon	Located in lists and reports, users can sort the contents of a list by any column that has this icon in its header. Click to sort in ascending or descending order.
15.		Exception Indicator	When viewing search results for visits, any field marked by a red dot indicates data that is missing.
16.		Edit Button	Opens an individual record with its fields in an editable state.

Buttons and Icons

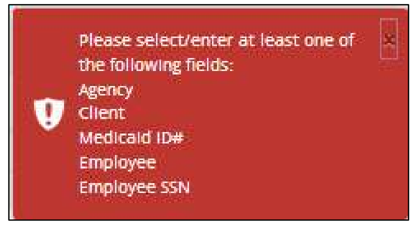
The following buttons are frequently displayed throughout the Sandata system:

Button	Function	Description
	Add Button	Clicking this button adds another row to a listing.
	Cancel Button	Cancels an operation and closes the screen.
	Check Box	Filling a check box enables a feature, clearing it disables it.

Button	Function	Description
	Clock Icon	In fields that require a time to be entered, clicking this icon allows the user to select a time. 
	Create Button	Creates a new item in any list.
	Delete/Termiate Button	Moves an item/user to “Inactive” status. The User is prompted to confirm.
	Finish Button	Completes and terminates a task.
	Lock Icon	Displays the password to help with log-in and password entry.
	Radio Button	Radio buttons allow the user to select one or more items from a list.
	Reactivate Button	Moves and item/user to “Active’ status. User is prompted to confirm.
	Refresh Button	Refreshes one or several fields on a screen, usually search fields.
	Save Button	Located in *Data Entry* fields, this button saves the information that has been entered.
	Show Information Icon	Clicking this icon displays additional information about a system field. For example, at the login screen clicking this icon displays a password being typed in. 
	Terminate Button	This button moves either a client record to a “Terminated” status.

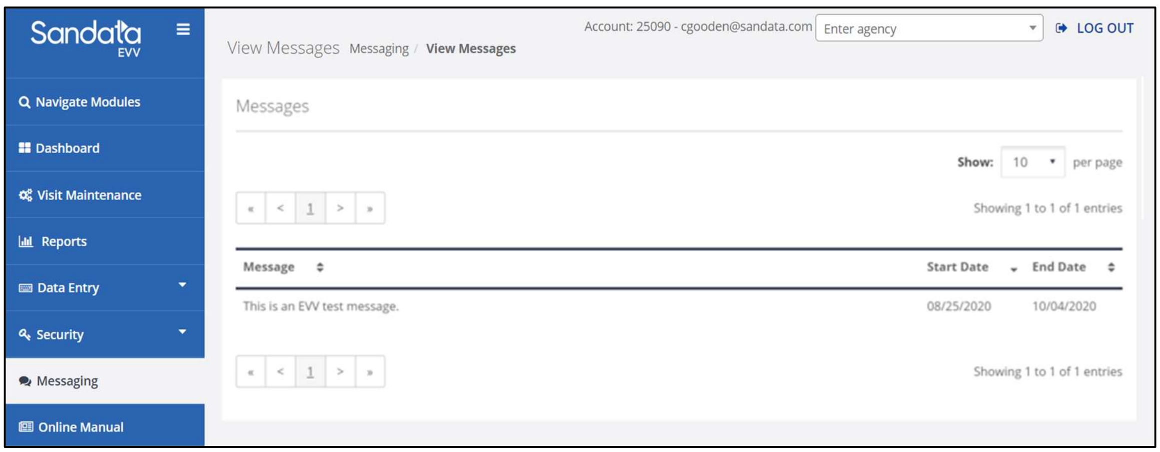
Confirmation and Error Messages

Confirmation and error messages are displayed at the top, center of the screen.



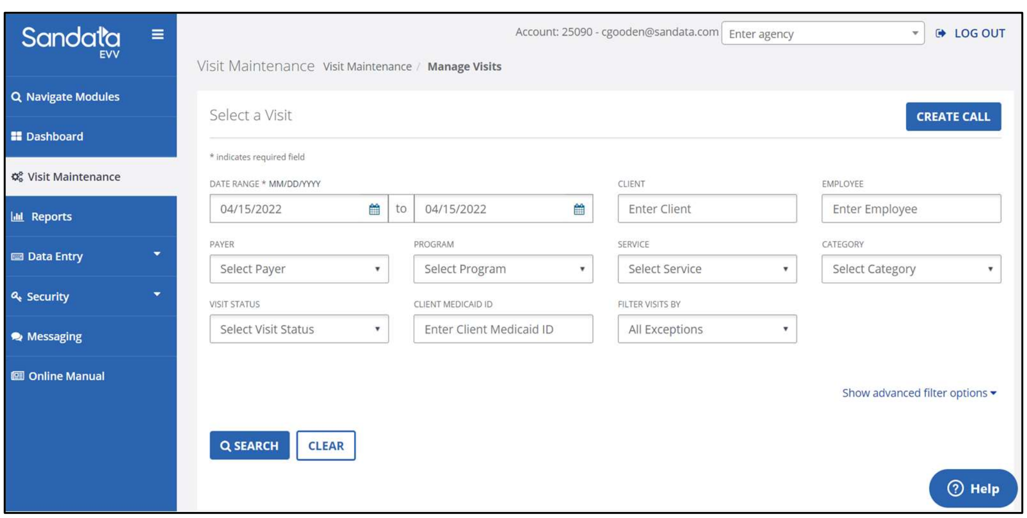
Messaging

Click the messaging tab to view incoming messages. These messages are view only – you cannot respond. The message will be visible in EVV from the **Start Date** to the **End Date**, on the right-hand side of the screen. After the end date, the message will disappear.



Help

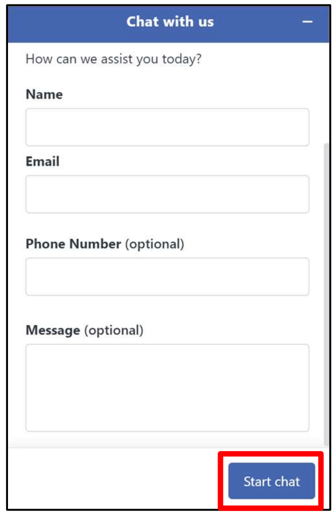
The Help bubble allows you to communicate with the EVV Provider Hotline. The Help bubble will appear on each screen in EVV.



Take the following steps to chat with the EVV Provider Hotline:

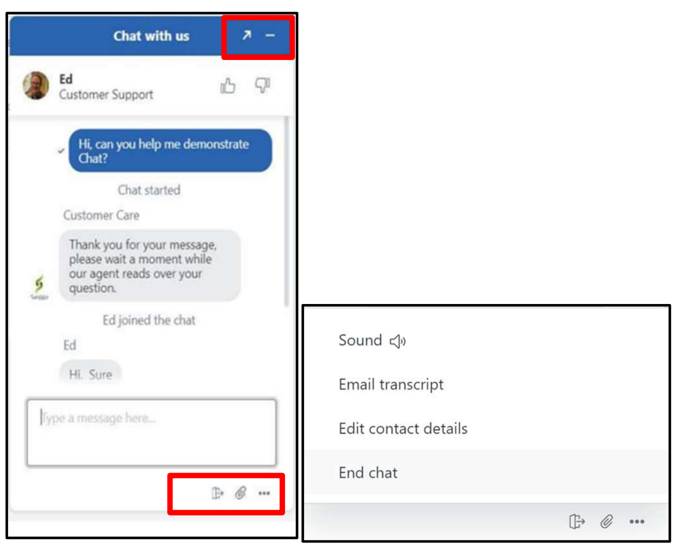
1. Click on the Help Button.

2. The chat window appears. Complete the Name and Email fields. The Phone Number and Message fields are optional. When you are ready to chat, click **Start Chat**.

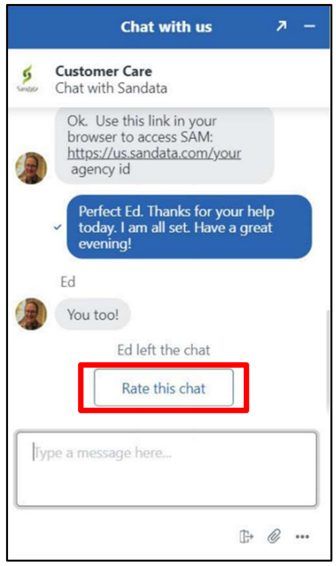


Please do not enter Personal Health Information (PHI) in the Chat.

3. An agent will join the chat. Type in your responses, and press **ENTER** to send. You may also use the **attachment** icon to attach images. Click the three dots **(...)** to adjust the volume of the chat notifications, email a copy of the chat transcript, change your contact information, or end chat. You may also click the arrow in the upper right-hand corner, to open the chat in its own browser window.

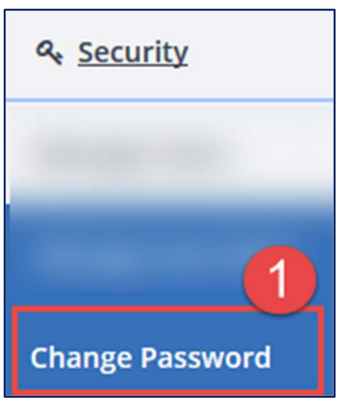


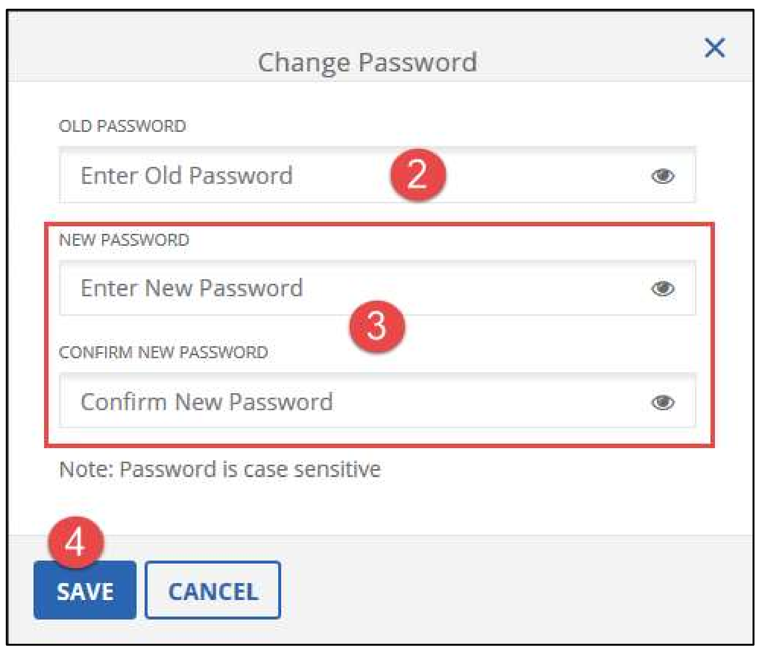
4. After the chat ends, you will have the option to rate the interaction. Click **RATE THIS CHAT**. When you are finished, click the minus icon **(-)** to minimize and close the chat window.



Security

Change Password allows the logged in user to change his/her password.





1. Click **Change Password** from the main **Security** menu. The *Change Password* panel opens.
2. Enter your current password in the **OLD PASSWORD** field.
3. Enter your new password in the **NEW PASSWORD** field; type it again in the **CONFIRM NEW PASSWORD** field.
4. Click **SAVE**.

3 Data Entry

Module Time

45 minutes

This lesson introduces how clients are input and maintained in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- search for a client;
- add a client's record;
- update a client's record, and;
- delete/close a client's record;

Key Terminology

Term/Acronym	Definition
Client/Individual	A person who receives services through the Medicaid program
Non-Agency Provider	An individual worker who provides care to one or more clients

Introduction

The *Data Entry* module allows system users to maintain client records. A system user with the appropriate permissions will see the *Data Entry* link listed in the *Navigation* panel on the left side of the screen. Clicking on the link will expand the section to show the **Clients** option.

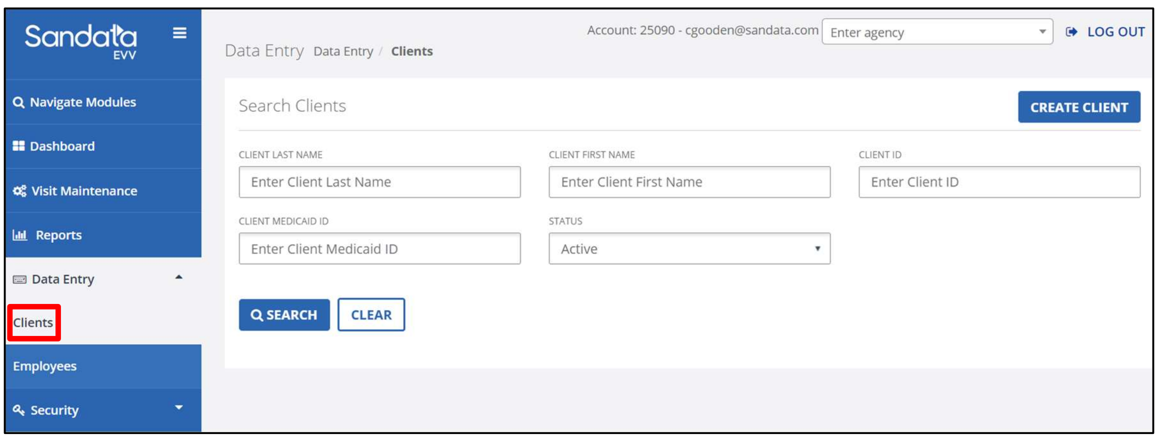
Client Data

Searching for a Client

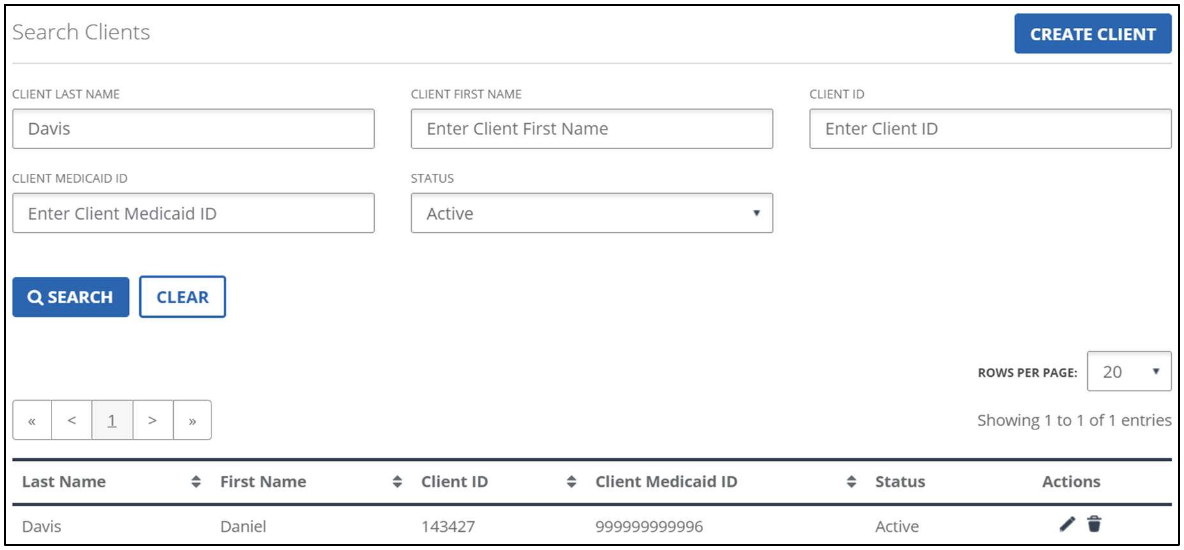
Best practice is to perform a search to see if the client already exists in Sandata EVV to prevent duplicate client records.

The system prevents duplicate client entry based on the Client ID/Medicaid ID.

1. Click **Data Entry>Clients** from the *Navigation* panel. The *Data Entry / Clients* search screen displays.



2. Enter values either in the **CLIENT LAST NAME, CLIENT FIRST NAME, CLIENT ID, CLIENT MEDICAID ID** or **STATUS** field, or a combination of the five (5).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



TIP

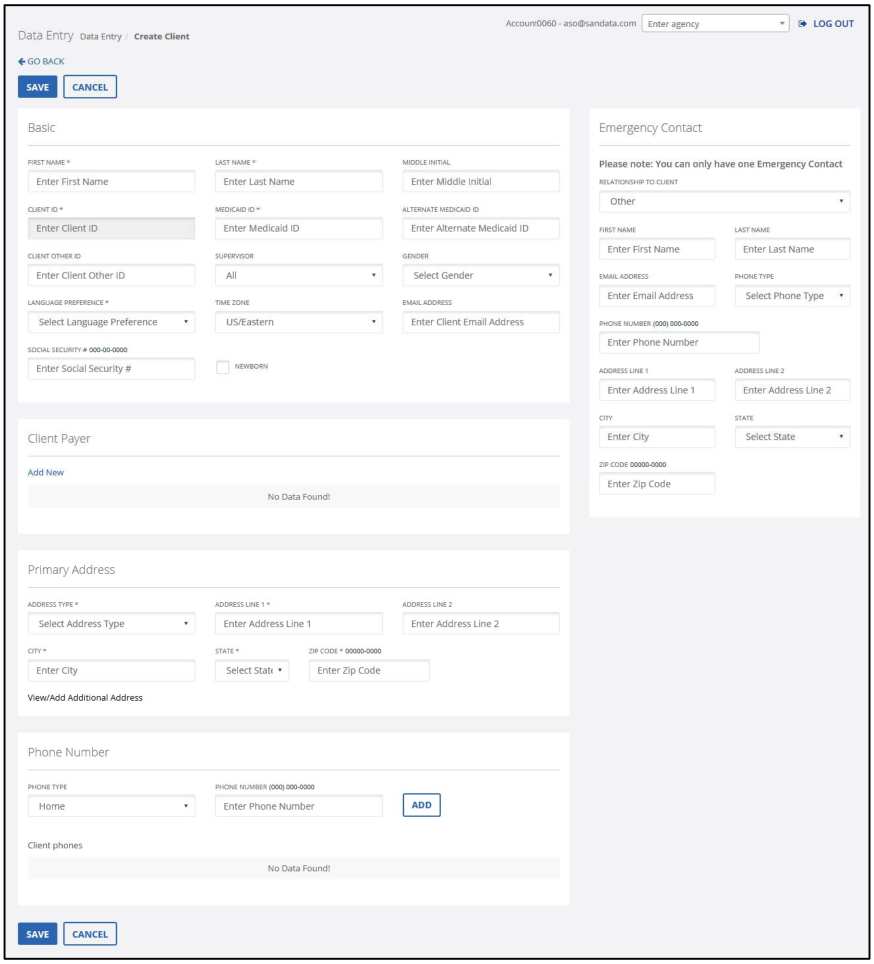
If multiple search values are entered, Sandata EVV attempts to match against all exact values entered.

Searching with no criteria selected displays a complete list of all active clients.

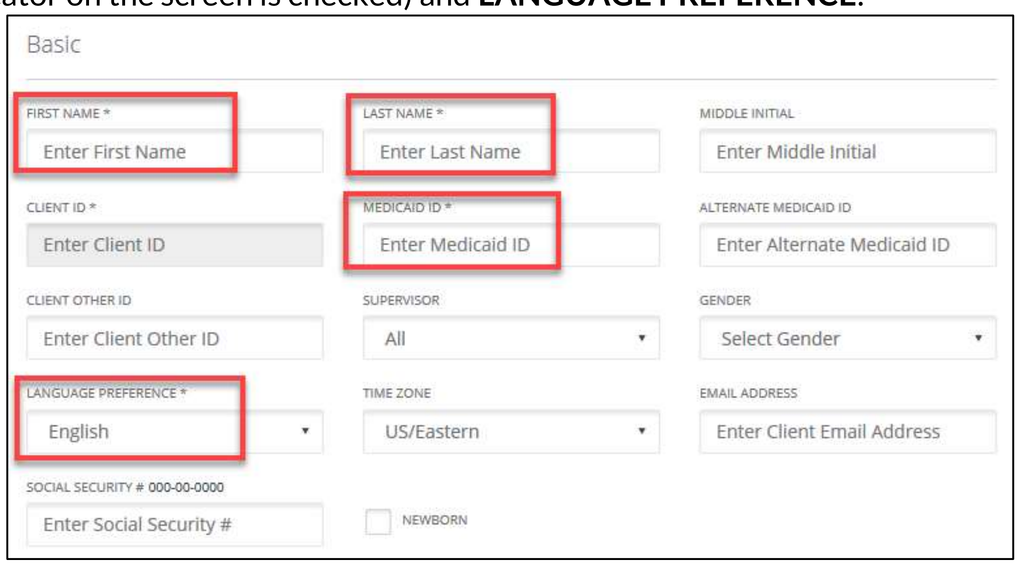
Creating a New Client Record

When creating a client record, the required fields are indicated with an asterisk (*) to the right of the field. All other fields on the screen are optional. Complete the following steps to create a new client record.

1. Click **CREATE CLIENT.** The *Create Client* screen opens**.**



2. Enter **FIRST NAME, LAST NAME, MEDICAID ID** (not required if the **NEWBORN** indicator on the screen is checked) and **LANGUAGE PREFERENCE**.



For newborn clients, while the newborn Medicaid ID is pending, the newborn number provided by the payer should be entered in the Client Payer ID field within the Add/Edit Payer screen that will be shown later in the training. Once the

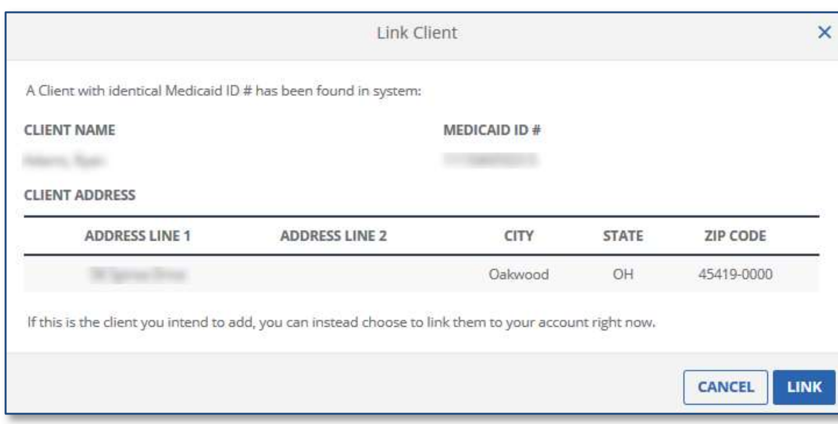
Medicaid ID is received, it must be entered in the client record. You will not need to remove this number.

The mother's Medicaid ID should NOT be used if the newborn does not have a Medicaid ID yet.

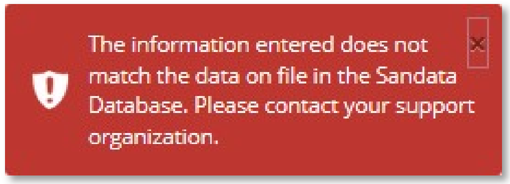
In the event a client receives a new Medicaid ID (for example, coverage lapses or adoptions) enter the new ID in the **ALTERNATE MEDICAID ID** field.

In general, any instance which causes a new Medicaid ID to be created for an individual, the new Medicaid ID should be entered in the Alternate Medicaid ID field.

If the Last Name and Medicaid ID being entered already exisits in the system, a *Link Client* pop-up screen displays stating a client with an identical Medicaid ID # has been found. The pop-up includes the existing client's information. If you are trying to add the same client, click **LINK**. If the client being added is different, click **CANCEL**.

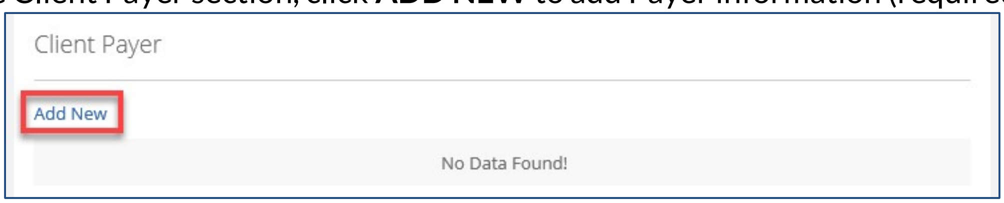


- If the Medicaid ID entered is found in the system but the Last Name is different, you will an error message, and will need to contact Support for further assistance.

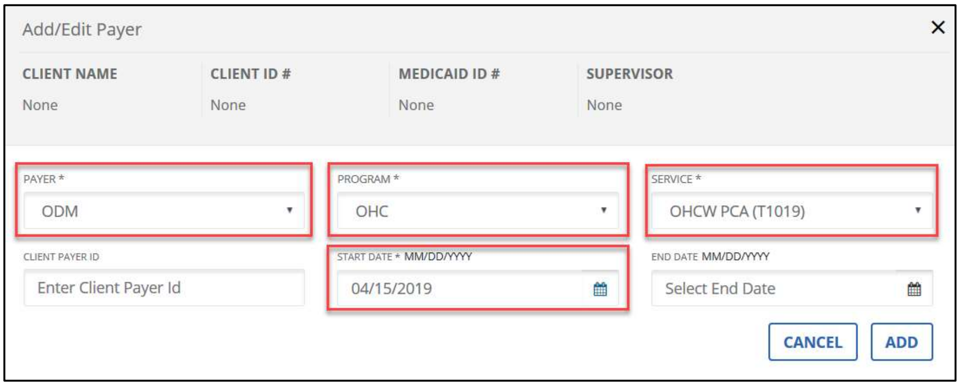


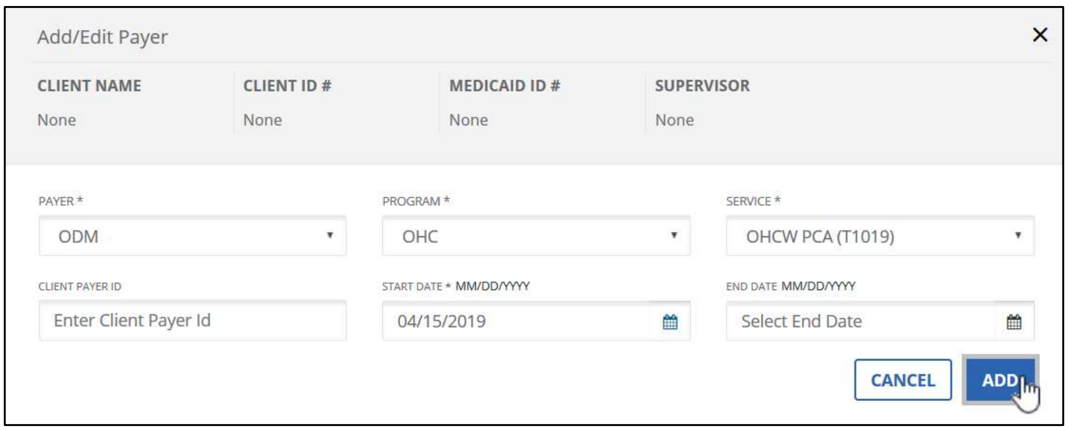
A **REQUEST MOBILE DEVICE** button is also available in the *Basic* section of the client screen to submit a request for an EVV Device for the client. This process is explained in detail in the *eTRAC & EVV Device Management* module of this guide.

3. In the Client Payer section, click **ADD NEW** to add Payer information (required).



   a. Click in the **PAYER** drop-down to select a payer.
   b. Click in the **PROGRAM** drop-down to select a program. The available options are determined by the chosen payer.
   c. Click in the **SERVICE** drop-down to select a service. The available options are determined by the chosen payer and program.
   d. Enter the **CLIENT PAYER ID** if necessary. For ODA clients, enter the Passport Information Management System (PIMS) ID in the Client Payer ID field. The Medicaid ID is one of the fields that is used to match a claim. Once the Medicaid ID is received, it must be entered into the Client Entry screen.
   e. Select a **START DATE**.
   f. Select an **END DATE,** if known.

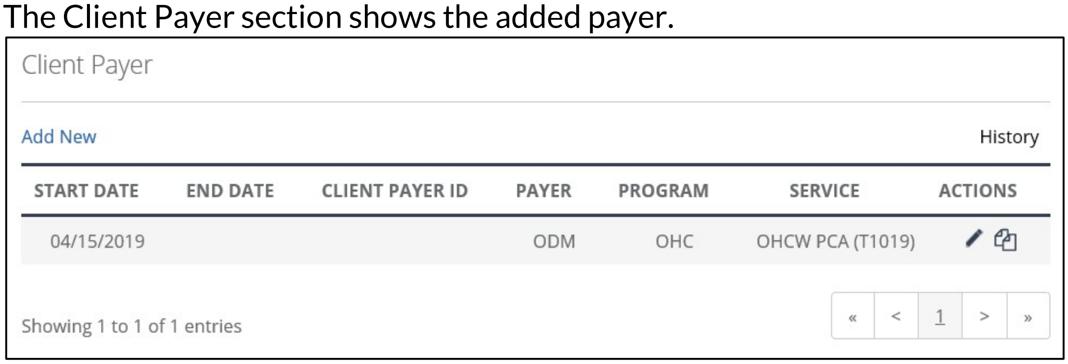




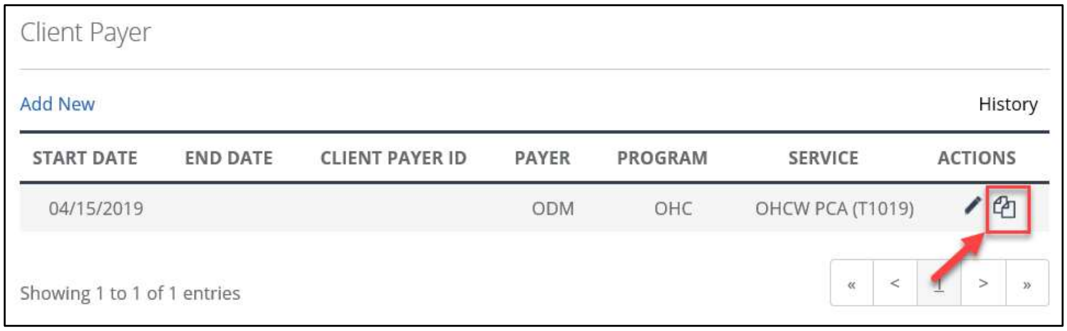
4. Click **ADD**.

Upon clicking **ADD**, the Payer information is added to the record and the Payer fields are cleared. The Add/Edit Payer screen remains open, ready for additional payers to be entered. Click the 'X' in the upper-right corner to close the window.

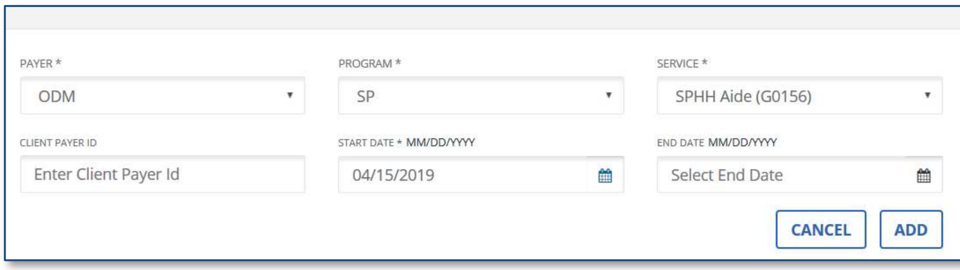
5. The Client Payer section shows the added payer.



6. To add another service for the same payer or add another payer to the client, click the **Copy Payer** icon to the right of the line.

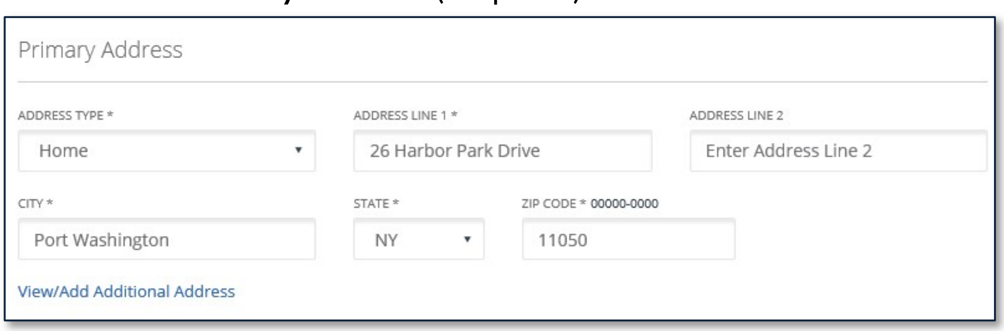


a. Update the **PAYER**, **PROGRAM** and **SERVICE** fields as needed and click **ADD**.

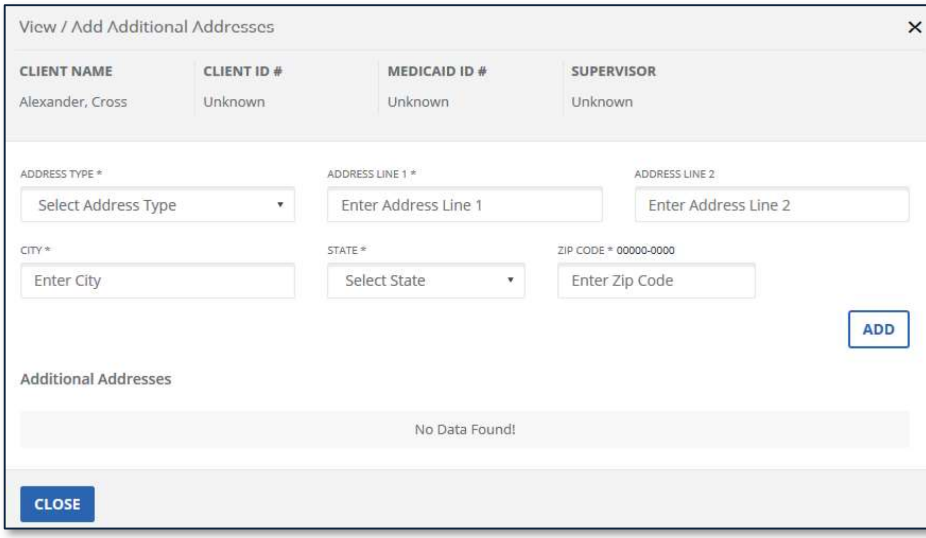


b. The additional payer information is added to the client record.

7. Enter client's **Primary Address**. (Required)



If a client has more than one address where he or she can receive care, click the **View/Add Additional Addresses** link to add the additional address(s). This allows the system to validate call times against the additional addresses to aid in minimizing visit exceptions.

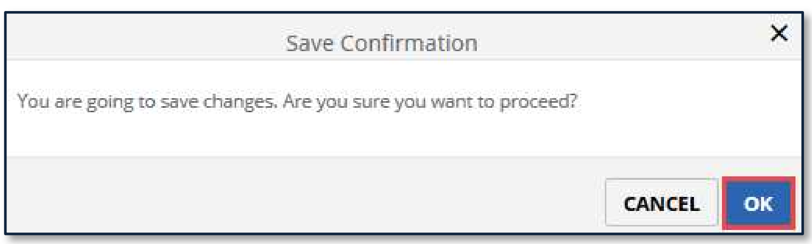


8. Select **PHONE TYPE**. Enter client's **PHONE NUMBER**. (Optional)

If a phone type is selected, a phone number **must** be added.

---

9. Click **ADD**. The phone number is added and marked as primary. (Optional)
10. Enter **Emergency Contact** information for the client. (Optional)
11. Click **SAVE**. The *Save Confirmation* dialog box displays.



12. Click **OK**. The client is added to the system.

Modifying an Existing Client Record

Modifying a client's data allows updates to the information, as necessary. Any updates made for the client is effective from the time the change is made. The information previously available continues to be in effect for all calls and visits prior to the change.

If the client is a newborn, the record will need to be modified once a Medicaid ID number is assigned. When the **NEWBORN** indicator box is checked, the Medicaid ID field becomes optional and non-editable. When a newborn client receives a Medicaid ID, the **NEWBORN** box can be unchecked, opening the Medicaid ID field allowing entry of the Medicaid ID.

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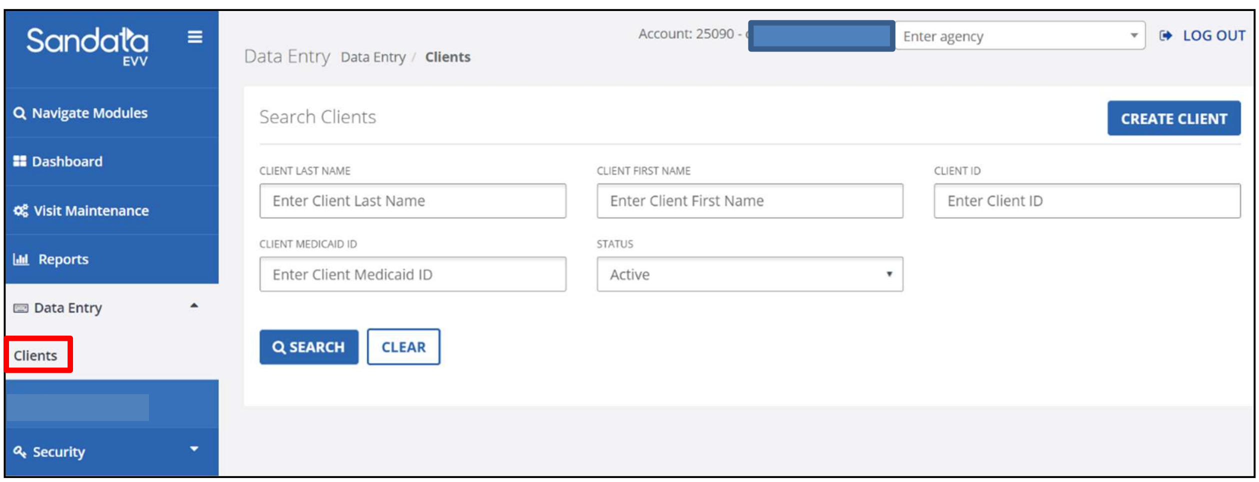
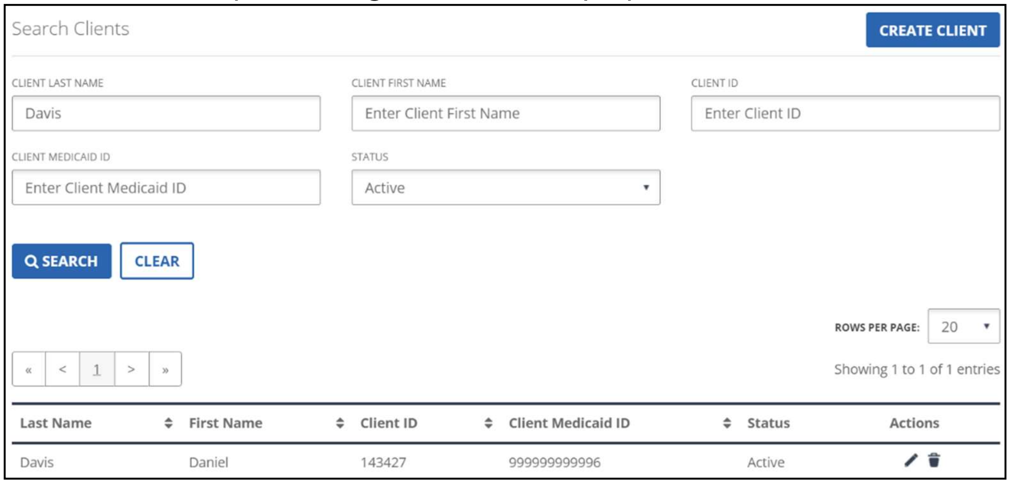
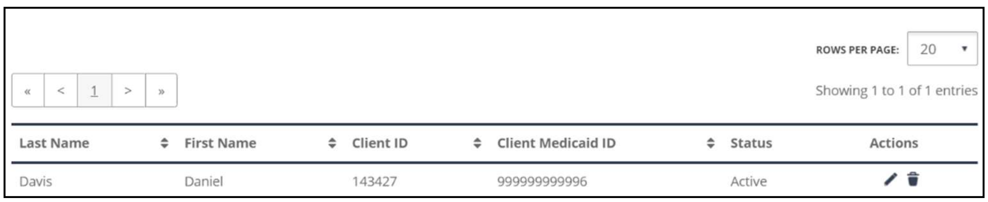
1. Click **Data Entry>Clients** from the *Navigation* panel. The *Data Entry / Clients* search screen displays.



2. Enter values either in the **CLIENT LAST NAME, CLIENT FIRST NAME, CLIENT ID, CLIENT MEDICAID ID** or **STATUS** field, or a combination of the five (5).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.

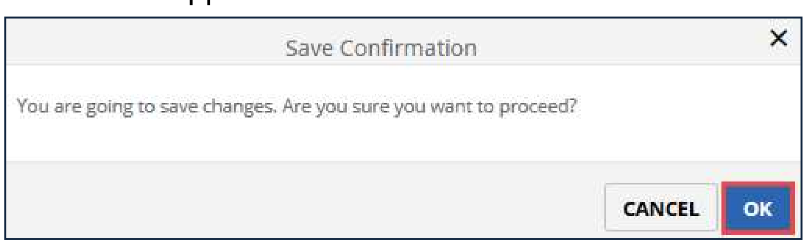


4. Click the pencil icon next to the client's name to reopen the client record.



5. Make any changes to the client record, then click save.

6. The confirmation screen appears. Click OK.



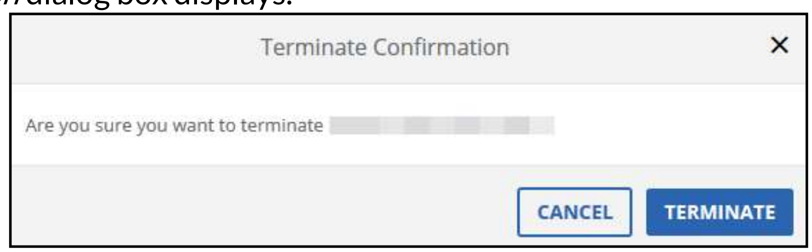
7. Changes have been saved.

Terminating a Client Record

Use the **Terminate** option to remove client data from Sandata EVV going forward. When a client is terminated, no activity will be allowed on that client record, including call-ins and callouts or client record modifications. Any activity already captured will continue to reference the client's previous information. In other words, termination is not retroactive. Complete the following steps to terminate the client record.

1. Search for a client.

2. Click **Terminate** ( ) to the right of the selected client's name. The *Terminate Confirmation* dialog box displays.

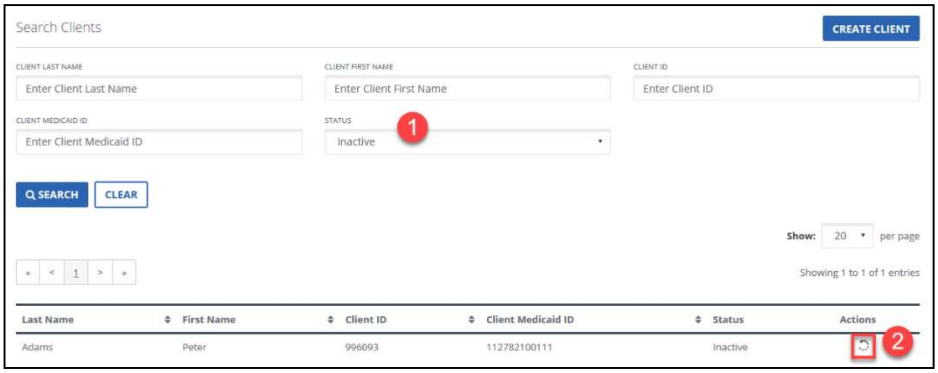


3. Click **TERMINATE**. A successful confirmation displays.

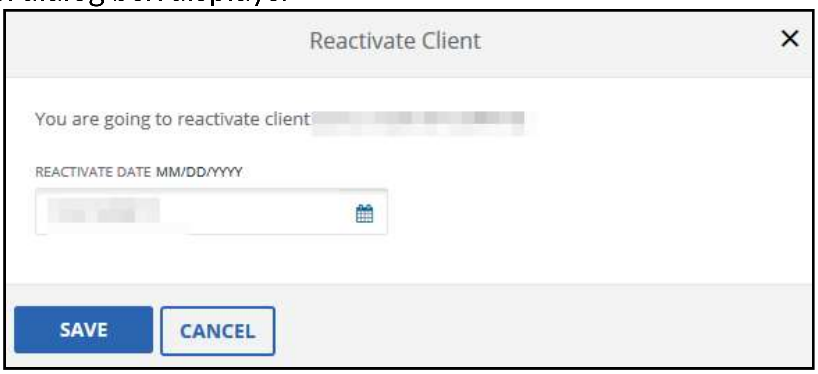
Reactivating a Client Record

A client can also be reactivated. Complete the following steps to reactivate the client record.

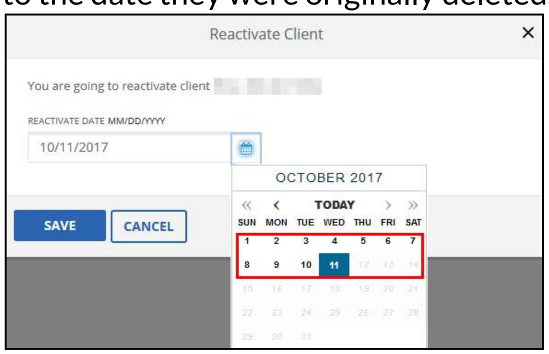
1. Search for a client with the status of **Inactive**.



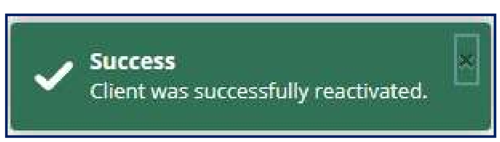
2. Click **Reactivate** (◌) to the right of the selected client's name. The *Reactivate Client* confirmation dialog box displays.



3. Select a **REACTIVATE DATE**. The date defaults to the current day's date. A client can be reactivated up to the date they were originally deleted.



4. Click **SAVE**. A successful confirmation dialog box displays.



4 eTRAC & EVV Device Management

Module Time

30 minutes

This lesson demonstrates how to request devices for clients and how to request to return devices.

Module Objectives

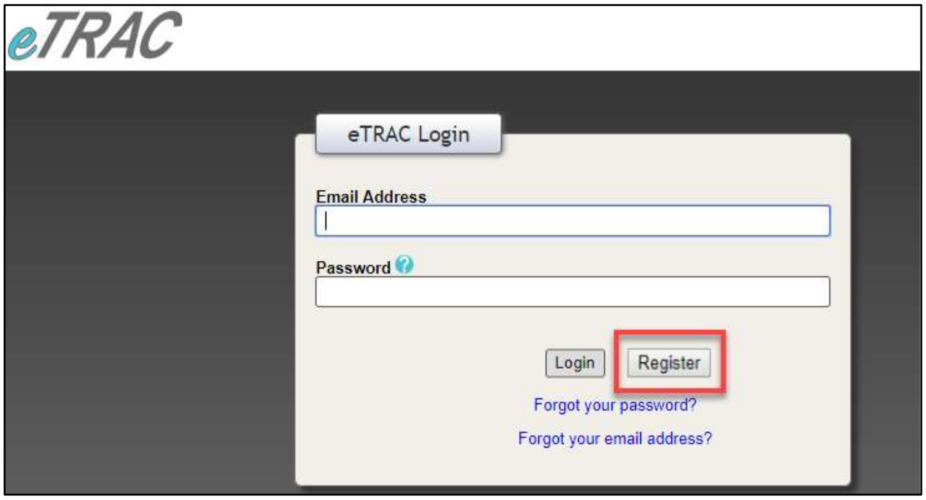
After completing this lesson, you will be able to:

- register in the eTRAC Portal; and
- utilize eTRAC functionality, including:
    - requesting a device for a client in the eTRAC Portal;
    - requesting a device for a client in Sandata EVV;
    - replacing a device; and
    - returning a device.

Registering as a Provider in the eTRAC Portal

Registration in the eTRAC Portal is the first step necessary to order or manage devices. Use the following URL to access the eTRAC Portal: https://etraconline.net/login.

1. Click **Register,** when on the eTRAC website.

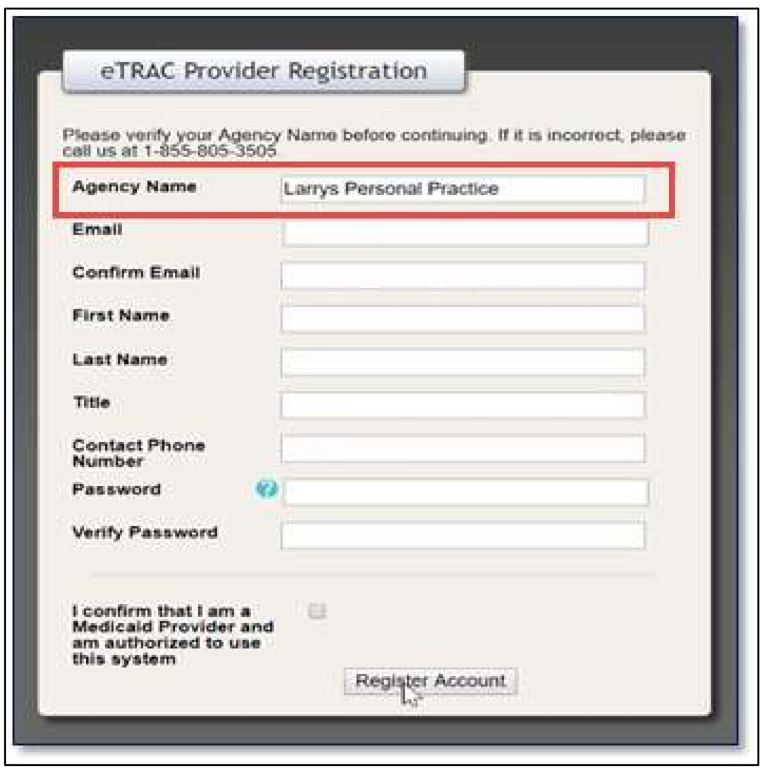


2. Enter the **Provider Medicaid ID**, and then again in the **ReEnter Provider Medicaid ID** field to confirm it and click **Continue**.

3. Enter the email address on file with the Ohio Department of Medicaid (ODM), that matches your entered Medicaid Provider ID. If the email address you enter does not match what ODM has on file, you will see the message displayed in **red** in the

screenshot below. If you see this, please call ODM at 800-686-1516 to update the email address on file.

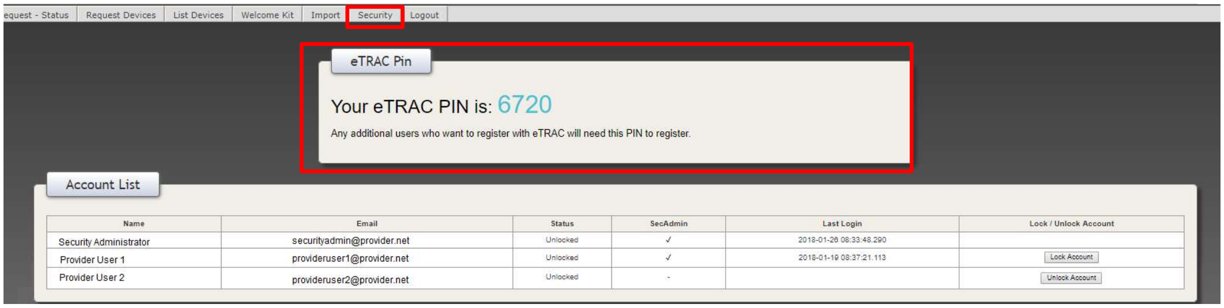
4. If the email address you entered matches what ODM has on file for your Provider ID, you will see a screen with your personal name for the email populated on the next screen. You will also see additional fields for you to enter information. Fill out your information and choose a password.



5. Click **“I confirm that I am a Medicaid Provider…system”** checkbox to confirm the user is a Medicaid Provider and authorized to use the system.
6. Click **Register Account**.

What is the Security Tab?

The first person to register for an account for a Provider ID in eTRAC will become that Provider ID’s *Security Administrator* in eTRAC. As an independent provider, you are the Security Administrator for your account, and will not need to add additional users.



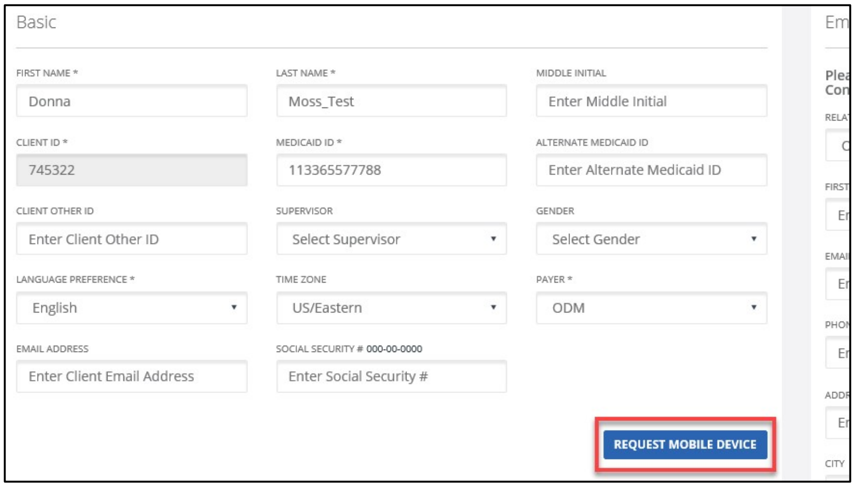
Requesting a Device

Devices can be requested for a client in EVV where the client is created or requested in eTRAC. In EVV, the request button appears in the *Basic* section of the client record. In eTRAC, the screen to enter the individual information/address is the *Request Devices* screen. If a device request is made in EVV, all information flows through and appears in the List Devices screen. Note, the provider must already be in eTRAC in order for this process to function.

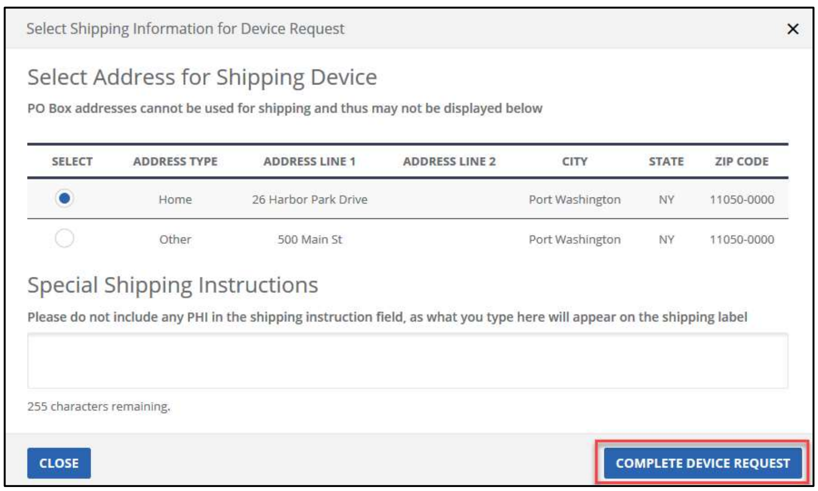
Requesting a Device in EVV

For assistance locating an existing client record, please see the “Modifying an Existing Client Record” section of this guide.

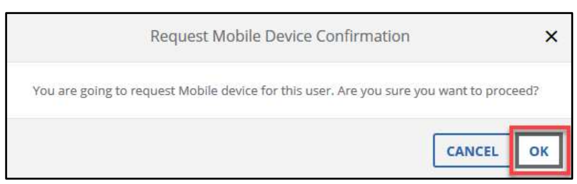
1. Sign in to https://evv.sandata.com/ .
2. Search for and locate the client record.
3. Click the Edit icon to open the client record.
4. Click the **REQUEST MOBILE DEVICE** button.



5. Select or confirm the Shipping address (If the client has multiple addresses, the primary address is selected by default). Enter special shipping instructions into the text box if needed (e.g. please go to side door).



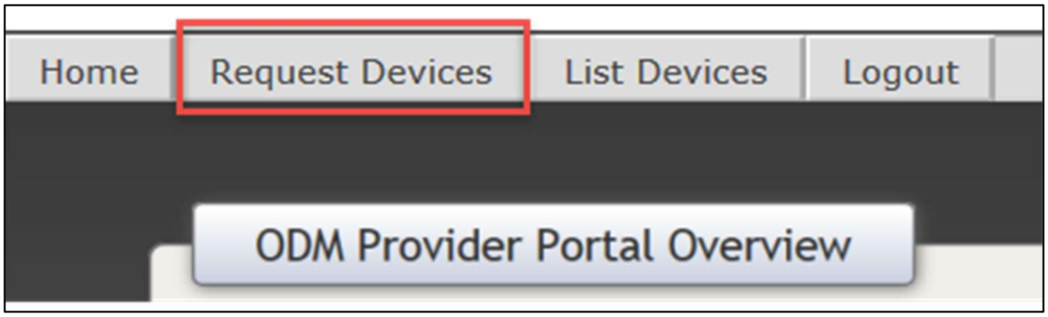
6. Click **COMPLETE DEVICE REQUEST**.
7. A request confirmation screen appears. Click **OK** to complete the order.



8. A Success message appears at the top of the screen.

Requesting a Device in eTRAC

1. When logged into the eTRAC Portal, a list of options displays across the top of the screen. Click **Request Devices**. The *Request EVV Device* screen displays.



2. Complete the fields with information regarding the client for whom the EVV Device is being ordered.

- **Ind. Medicaid ID:** This is the client's 12-digit Medicaid ID.
- **Address:** This is the address of the client and where they will be receiving the device.
- **Special Shipping Instructions:** Additional information can be added that will help ensure delivery of the device, such as where to leave the package outside a client's home. Example: "Please go to the side door, next to the garage and allow extra time for the client to answer the door".

Neither Personal Health Information (PHI) nor Personal Identifiable Information (PII) is to be entered in the **Special Shipping Instructions** field.

3. Click **Request Device**, when finished filling out the fields. The *Request EVV Device* screen displays again with all entry fields blank.

If the EVV Device request is successful, a confirmation displays in blue text with the client's name and a logistics ticket number.

Ordering EVV Devices for Clients with PIMS and Newborn IDs

When ordering a device in eTRAC, use the Medicaid ID. If you do not have a Medicaid ID for the client, you should use one of the following options:

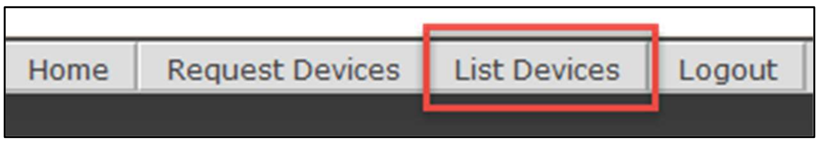
- PIMS (ODA clients): Enter the following information in the Medicaid ID field. Add enough 0's at the end to make a 12-digit entry:
  - Start with: P+PIMS ID+0's
  - Example: If the PIMS ID is 1234567, you would enter "P12345670000"
- Newborn IDs: Devices for newborn clients without Medicaid ID's can be ordered in eTRAC or EVV. Enter the following information in the Medicaid ID field. Add enough 0's at the end to make a 12-digit entry:
  - Start with: EVV Acct # + N + EVV Generated Client ID + 0's

	○ Example: If the EVV Acct # ID is 6789 and the EVV Generated Client ID is 985456, you would enter "6789N9854560" ○ If the Newborn ID is greater than 12-digits long, you must request the Device from EVV.

The logistics ticket number is used to locate the request on the *List Devices* tab or when calling EVV Provider Hotline.

Viewing Device Information

Click **List Devices** to display a list of EVV Devices that have already been requested for your client(s).



Another provider may have already requested a device for a client. You must still request a device for this client. The *List Devices* screen displays the tracking status based on the original device request for this client.

The *List Devices* screen displays:

My Agency's Devices - 99

Request Number	First Name	Last Name	Medicaid ID	Status	Action
L20171103.4	fred	barney	311032017	Processing	
L20171101.1	Sonya	Blade	21212561212	In Home View Tracking	Return Device
L20171128.52	Jane	Brown	114111282017	Processing	
L20171104.1	bob	build	132646564935	Processing	
L20171118.3	Bob	Builder	223311665533	Processing	
L20171118.1	Casey	Davis	452855426851	Processing	
L20170904.1	ODM	Demo Unit	946554651154	In Home View Tracking	Return Device
L20170906.1	Jim	Doe	123486364564	Processing	
L20171031.2	john	doe	94010312017	Processing	

1. **Request Number:** This is the logistics ticket number that is displayed in blue upon successful completion of the device request.
2. **First Name and Last Name:** This is the first and last name of the client for whom the device was requested.
3. **Medicaid ID:** This displays the Medicaid ID that has been entered for the client.
4. **Status:** This column indicates whether the EVV Device is Processing, In Transit, or In Home. When the EVV Device reaches the 'In-Transit' status, tracking information for the EVV Device is visible by clicking **View Tracking**.

Returning a Device

An EVV Device is to be returned using the eTRAC Portal only if:

- the client is no longer receiving care,
- the client has expired,
- the device is not needed, or
- the provider is using SMC on their smart device, and the device is not needed.

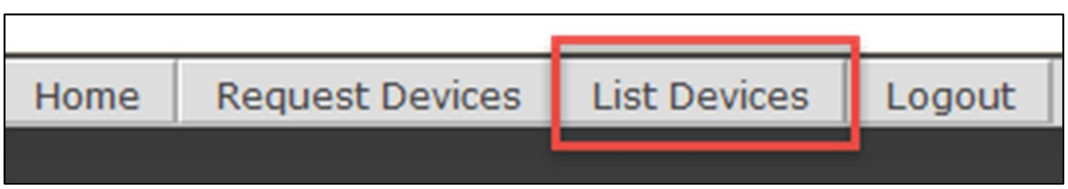
Email Confirmations

- Upon return request for reasons other than expired:
  - Email confirmations are sent to all other providers associated with the client.
- Five business days to respond:
  - Indicate you are still providing care to the client by clicking the link included in the email.
  - If no response is received, a return kit is sent to the client.

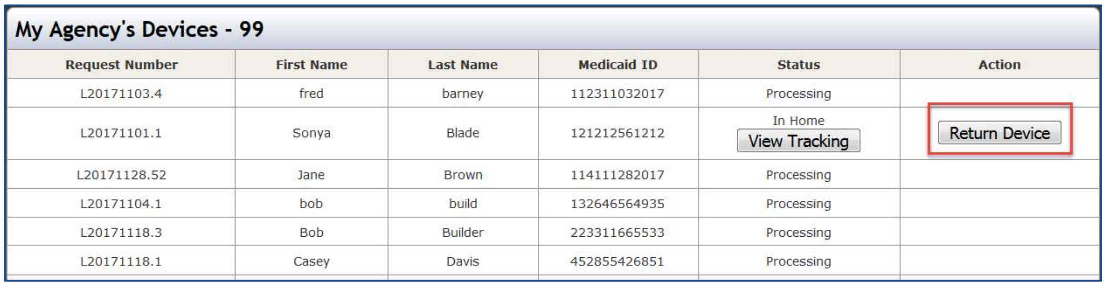
To return an EVV Device for any reason other than the four listed above, please contact the EVV Provider Hotline.

To return an EVV Device:

1. Click **List Devices**.



2. From the list, locate the client for whom the EVV Device return is necessary. Click **Return Device**, listed under the **Action** column on the right-hand side of the screen.



My Agency's Devices - 99

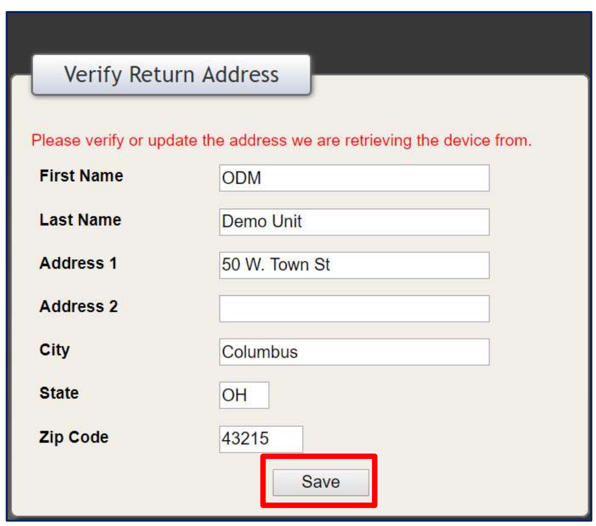
Request Number	First Name	Last Name	Medicaid ID	Status	Action
L20171103.4	fred	barney	112311032017	Processing	
L20171101.1	Sonya	Blade	121212561212	In Home View Tracking	Return Device
L20171128.52	Jane	Brown	114111282017	Processing	
L20171104.1	bob	build	132646564935	Processing	
L20171118.3	Bob	Builder	223311665533	Processing	
L20171118.1	Casey	Davis	452855426851	Processing	

Although the button is named **Return Device**, the provider is actually reporting a reason that the EVV Device is no longer being used to record visits to a client.

3. Select a **Return Reason** why the device is no longer to be used to record visits.

The list is an example of possible reasons and not necessarily all-inclusive. The EVV Device can be returned for any reason. If the EVV Device is being returned for a reason other than what's listed, please call the EVV Provider Hotline.

4. Click **Verify Address**. The *Verify Return Address* pop-up screen displays.



5. Click **Save** to close the *Verify Return Address* pop-up screen.
6. Click **Submit.**


Return Device
-- Select a Return Reason --
Verify Address
Submit

5 Visit Capture

Module Time

60 minutes
This lesson introduces the mobile visit verification call-in/call-out process and the telephony call process.

Module Objectives

After completing this lesson, you will be able to:

- explain the purpose and basic functionality of SMC;
- access and log on to SMC;
- identify the SMC window elements and explain how to navigate within SMC;
- describe the back-up call process utilizing the client's telephone or any phone associated with the client; and
- explain the different Call Reference Guides (CRG) available for use.

Sandata Mobile Connect

Sandata Mobile Connect (SMC) is the mobile visit verification app installed on provided EVV Device or downloadable onto a personal smartphone or tablet device.

For the Ohio EVV Program, SMC is the primary and preferred method of calling in and out for client visits.

Providers can start a visit using SMC and complete the visit using TVV and vice versa, if necessary.

SMC does not use the camera or microphone during operation. It GPS location only at the point of starting a visit and completing a visit.

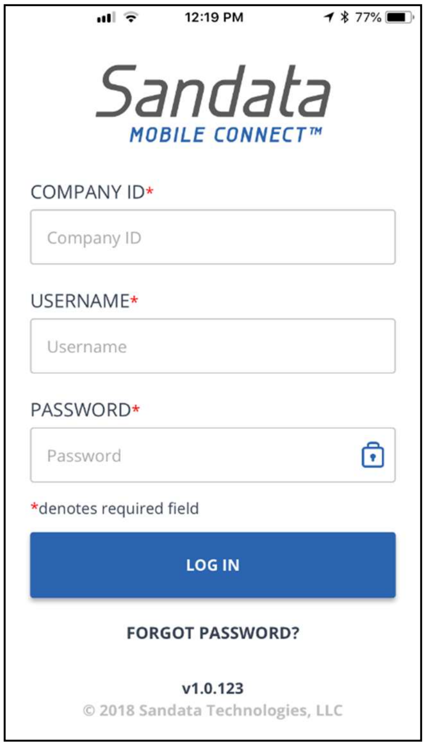
Getting Started in SMC

SMC user credentials for Non-Agency Providers are generated by Sandata. You can find your SMC credentials in the Welcome Kit Letter, located in the eTRAC portal.

The temporary password is valid for 60 days. If the temporary password has expired, please use the **FORGOT PASSWORD** function at the beginning of the set-up process.

When you tap on the SMC icon and log in for the first time, you will need to enter the following data elements:

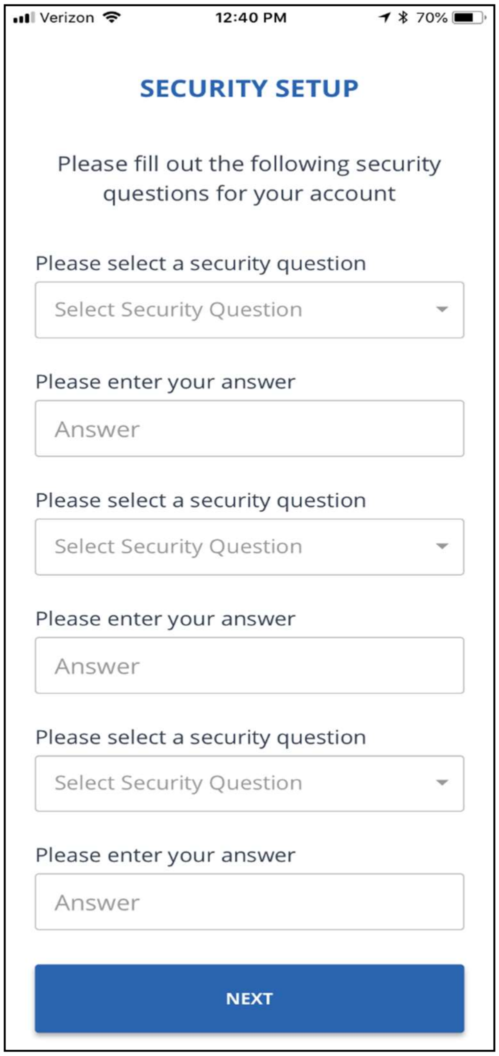
- **Company ID:** *2-Sandata account #* (always the number 2 plus a dash and the agency provider's assigned Sandata account #. Example: 2-10086).
- **Username:** your email address.
- **Password:** the temporary password emailed to your email address.

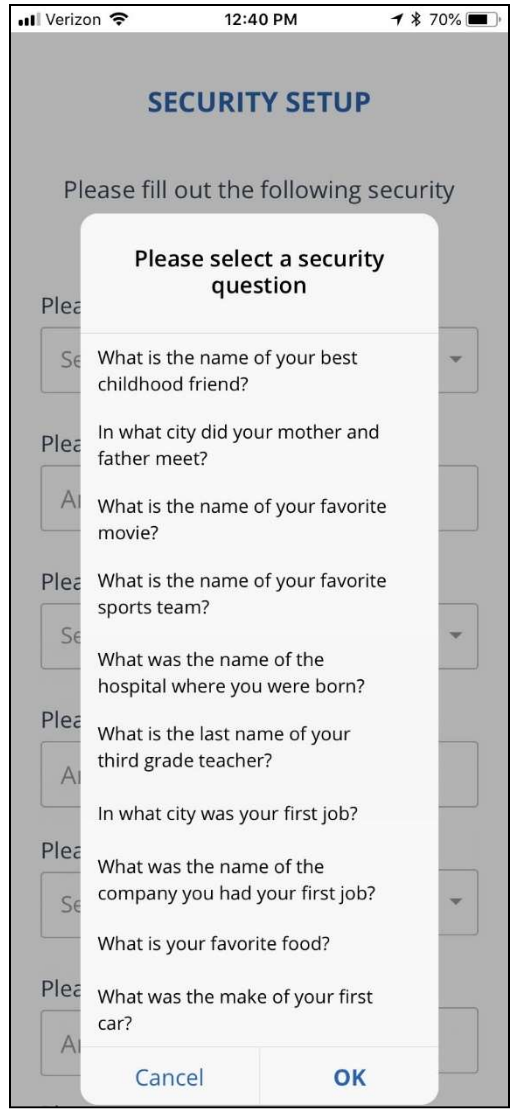


Tapping the lock icon in the **PASSWORD** field displays the password. Displaying the password can help with log-in and password entry.

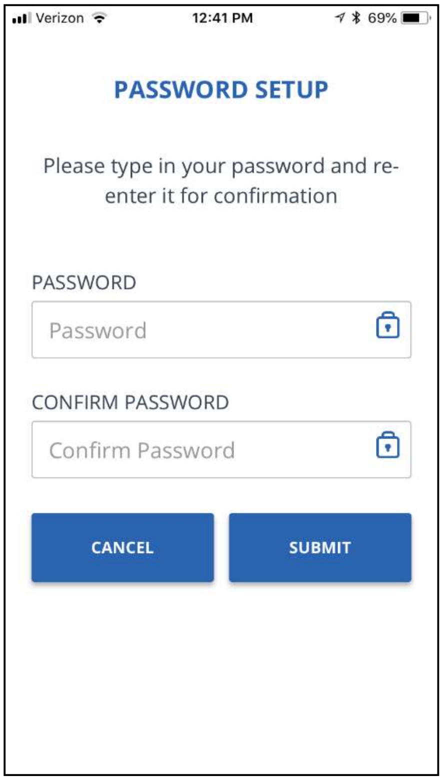
Tap the **FORGOT PASSWORD?** link to reset a locked password or reset a forgotten password.

After answering three (3) of the ten (10) security questions, the next screen prompts the employee to create a new password.





In the future, you can reset your password using security questions.



1. Enter the **New Password**.

Passwords are **case sensitive**. They must be at least twelve characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (@#$%^).

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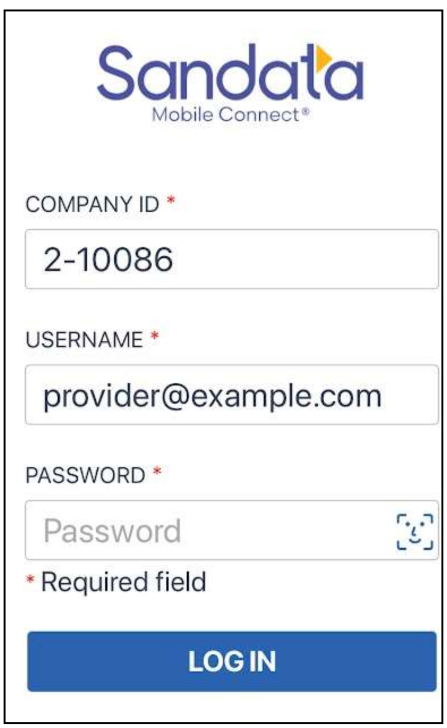
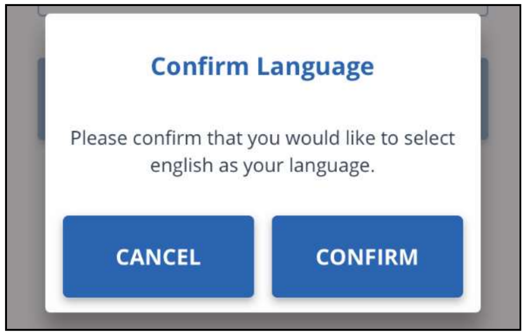
1. **Confirm Password**.
2. Tap **CONTINUE** after entering the new password.



The Login screen displays. The employee uses the new password at the next login.

After successfully logging in with the new password, confirm your language preference from a drop-down list on the screen. Languages available for the program include:

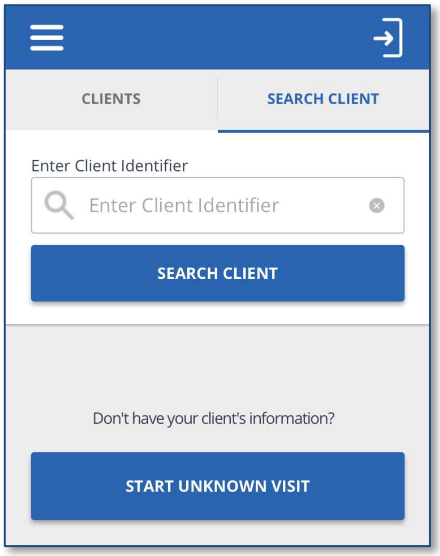


- English
- Egyptian Arabic
- French
- Fulah
- Hindi
- Mandarin Chinese
- Nepali
- Russian
- Serbian
- Somali
- Spanish
- Swahili
- Vietnamese

After confirming the language preference on the device, the *Home* screen displays.

The preferred language must be selected the first time the you log in to SMC from a new device.

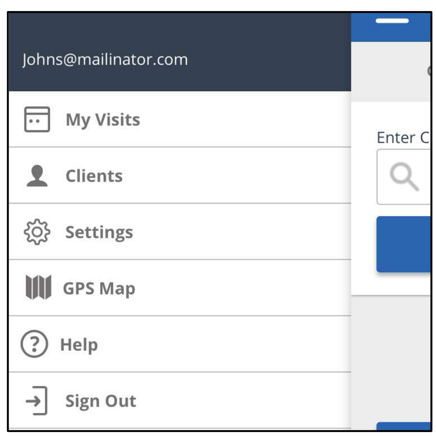
Navigating the SMC Home Screen



- **Search for a client to start a visit** – tap into the **Enter Client Identifier** field and enter the 12-digit Medicaid ID or EVV system generated Client ID to search for the client.
- **Start an unknown visit** – tap the **START UNKNOWN VISIT** to enter the client's name and Medicaid ID in order to start the visit.

You can also tap the menu icon in the upper-left corner of the screen to access:

- **My Visits** – to see completed past visits.
- **Clients** – to perform a client search.
- **Settings** – to change language preference and password. All other options on the settings screen are disabled.
- **GPS Map** – displays SMC user's current location.
- **Help** – to open the SMC help guide.
- **Sign Out** – to exit SMC. (The user can also tap the **Sign Out** icon in the upper-right corner of the screen to log out of SMC).



Starting an SMC Visit

Complete the following steps to start an SMC visit.

1. Locate the EVV Device or their personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or EVV system generated Client ID of the client.

Starting an Unknown Visit

If the Medicaid ID or Client ID entered is not found, you can still call-in and out by starting an unknown visit.

This will be covered after the known client call-in/call-out process.

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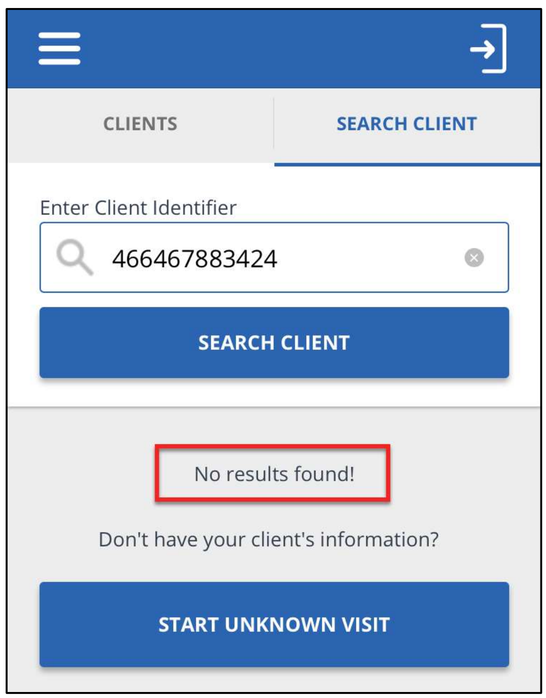
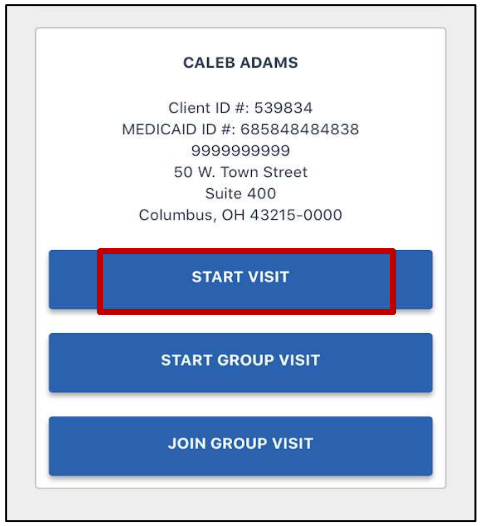
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a "No results found" message displays).



5. Tap the **START VISIT** button when the search results display.

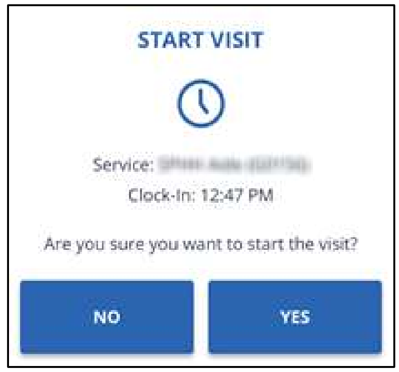


6. Select the *Service* from the drop-down list. (The list is based on the current services from the Payer section of the client record in Sandata EVV.) Tap **OK.**

Service Selection Note

A service must be selected in order to start a visit. If a service is not chosen and the you tap the **START VISIT** button, the screen displays "Required" above the Select Service field.

7. Tap the **START VISIT** button. A pop-up screen appears asking you to confirm the start of the visit. Tap **YES**.

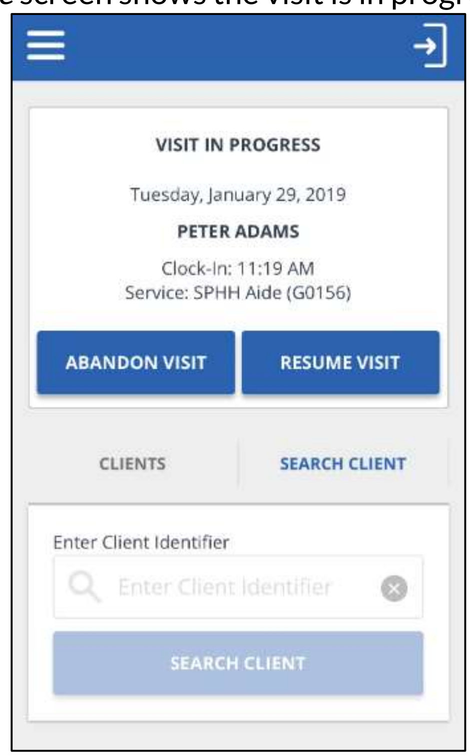


8. Log out of SMC and proceed with providing care.

To ensure security, after five (5) minutes of inactivity, a pop-up appears allowing the user to extend the session. If there is no activity during the two (2) minute extension period, the employee is automatically logged out of SMC.

Completing an SMC Visit

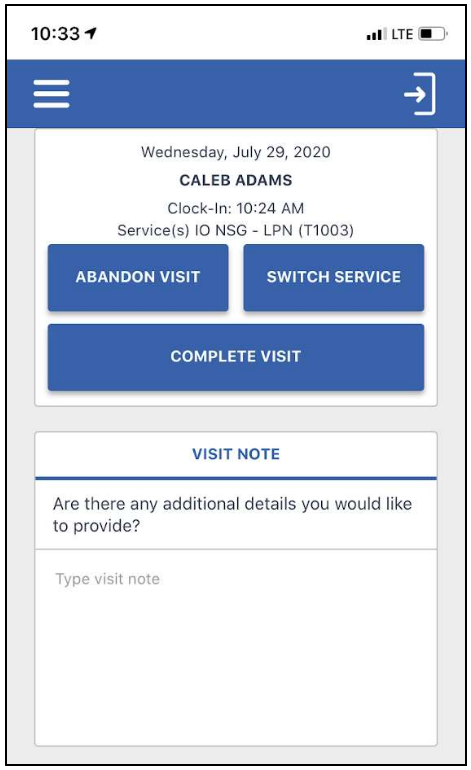
1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.



ABANDON VISIT button

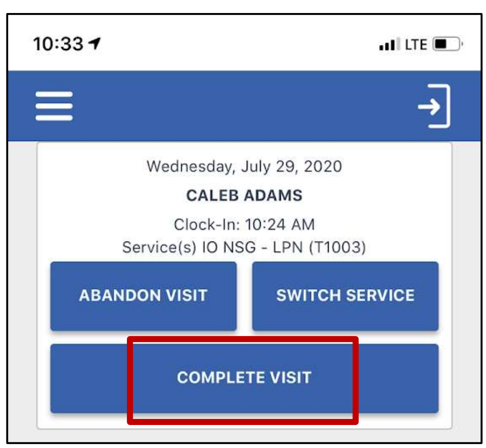
The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when a previous service from earlier in the day has completed but you forgot to call out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

2. The *Visit Note* screen displays. Enter notes if applicable.

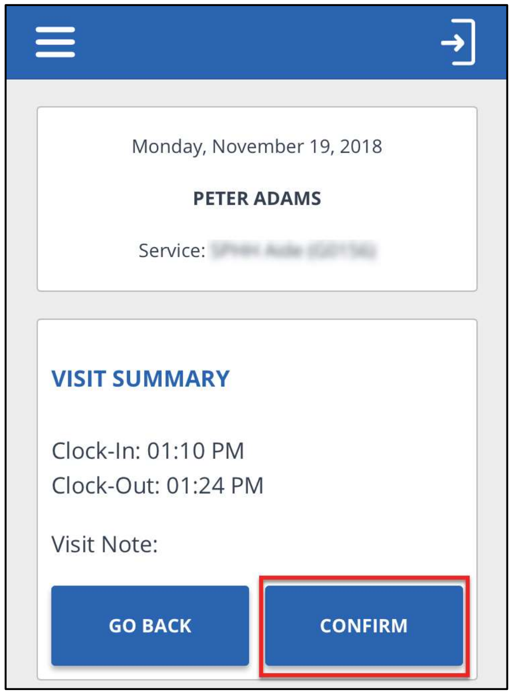


Please be aware that notes will never be required. This **Visit Note** field should **not** be used to capture clinical data, PHI or satisfy ODM documentation requirements.

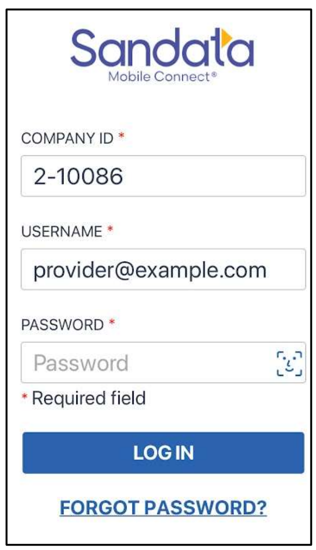
3. Tap **COMPLETE VISIT**.



4. The *Visit Summary* screen displays. Tap **CONFIRM**.



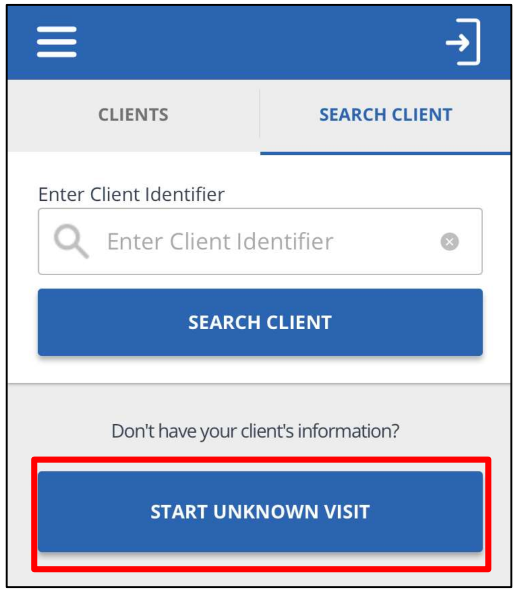
5. The visit is successfully submitted and the *Login* screen displays.



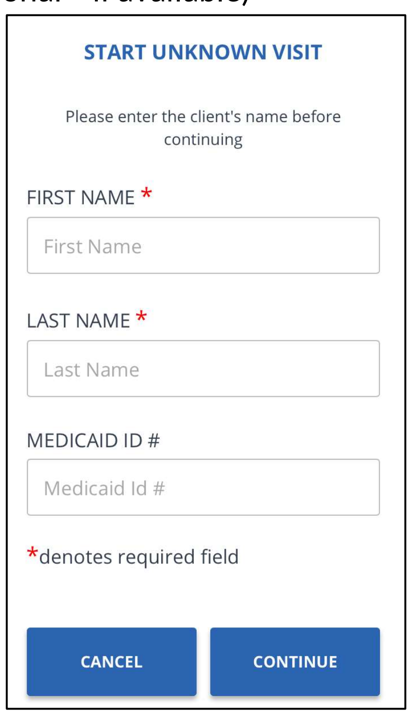
Starting an Unknown SMC Visit

If the Medicaid ID or Client ID entered is not found when trying to start a visit, you can start an unknown visit. Unknown visits appear in Sandata EVV as an *Unknown Client Visit* exception and must be fixed in *Visit Maintenance*. Complete the following steps to record an unknown visit.

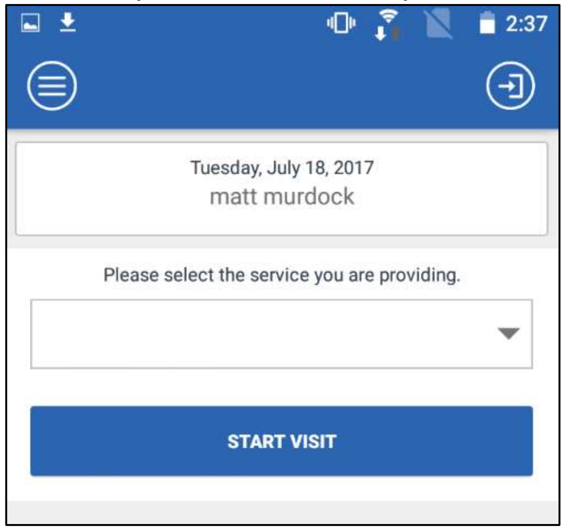
1. Locate the EVV Device or their personal device.
2. Log in to SMC.
3. Tap **START UNKNOWN VISIT**.



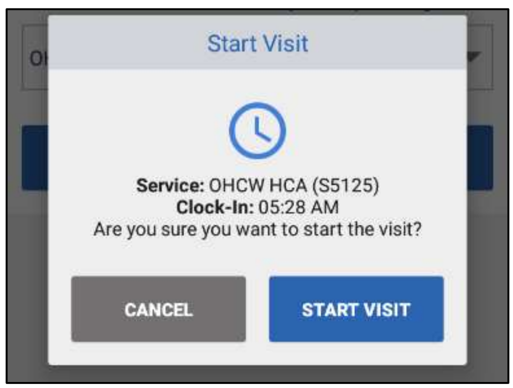
4. Enter the following information for the client (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
   - **FIRST NAME** (Required)
   - **LAST NAME** (Required)
   - **Medicaid ID #** (Optional – if available)



5. Tap **CONTINUE**.
6. Select the *Service* from the drop-down list, then tap **START VISIT.**



7. A pop-up displays asking you to confirm the start of visit. Tap **START VISIT**. The visit is completed following the same process used when completing a visit for a known client.



Telephonic Visit Verification

TVV is available as an alternative to the mobile call-in/call-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).

An employee can start a visit using TVV and complete the visit using SMC and vice versa, if required.

When using TVV, employees can call-in/call-out from any phone (i.e. client's home phone, cell phone or employee's cell phone).

TVV Service IDs

This tables lists the 3-digit Service IDs which needs to be entered during the TVV call-out process.

English toll-free numbers. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	616	Passport - LPN (T1003)
105	Physical Therapies (G0151)	636	IO NSG - LPN (T1003)
115	Occupational Therapies (G0152)	656	My Care - LPN (T1003)
125	Speech Language Pathology Therapies (G0153)	707	OHCW HCA (S5125)
202	SPHH Nsg - RN (G0299)	717	Passport HCA (S5125)
303	SPHH Nsg - LPN (G0300)	727	Passport - Waiver Choices HCAS (T2025)
404	PDN (T1000)	747	Passport - Consumer Directed Personal Care (T1019)
415	OHCW - Choices HCAS (T2025)	757	My Care - HCA (S5125)
505	OHCW Nsg - RN (T1002)	777	Passport HCA Personal Care (S5125)
515	Passport - NSG - RN (T1002)	808	OHCW PCA (T1019)
520	My Care - Waiver Choices HCAS (T2025)	818	Passport - PCA (T1019)
535	IO NSG - RN (T1002)	838	HPC
555	My Care - RN (T1002)	842	Participant-Directed Homemaker-Personal Care (HPC)
565	My Care - Waiver Consumer-Directed PCA (T1019)	878	My Care - PCA (T1019)
606	OHCW Nsg - LPN (T1003)	909	RN Assessment (T1001)

TVV Call Reference Guides

The following guide is a sample of what is included in the eTRAC Welcome Kit. Each provider will have a unique Call Reference Guide. Santrax TVV prompts callers up to three times to input information. If a caller receives a busy signal, try the alternate number. Two or more calls made within one minute of another will make one of the calls extraneous.

Sandata TECHNOLOGIES

Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

____

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:

STX ID Verification / Playback	Group Visit – No
Call In / Out	Select Service
Change Service	Client Voice Recording
Client Verification: Visit	Client Verification: Service

Calling Instructions **STX«ACCOUNT»**

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client's ID.

1. **Dial any of the toll-free numbers assigned to your agency.**
   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.
   Santrax will say: **"Welcome, please enter your Santrax ID."**
2. **Press the numbers of your Santrax ID on the touch tone phone.**
   Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**
3. **Press (1) to confirm your Santrax ID or press (2) to retry.**
   Santrax will say: **"Is this a group visit? Press (1) for Yes or (2) for No."**
4. **Press (2) for not a group visit.**
   Santrax will say: **"Please select (1) to call in or (2) to call out."**
6. **Press the (1) key to "Call In".**
   Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
7. **Press the numbers of the client's ID.**
   Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
8. **Hang up.**

TVV Call-In and Call-Out

Call-In	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: " *You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Press 1 to call-in or 2 to call-out."*
5	Press the 1 to call-in.
	Santrax will say*: "Received at [Time]." After a brief pause, Santrax will say:" Please enter first client ID or hang up if done.*" If the phone number the call is coming from is only associated to more than one (1) client, enter the system generated client ID found in the client record in Sandata EVV.
6	Hang up if no client ID is needed <u>or</u> all client IDs have been entered.

Santrax IDs and **Client IDs**

- The Santrax ID is a unique system-generated number identifier for the employee and is used by the employee to identify themselves on a TVV call.
- The Client ID is a unique system-generated number identifier for the client, used by the employee on a TVV call to identify the client.

Call-Out	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: " *You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]." After a brief pause, Santrax will say:" Please enter first client ID or hang up if done.*"
6	Enter the Client ID number.
	Santrax will say: "Please enter the Service ID."
7	Press the three-digit ID of the care performed.
	Santrax will say: "You entered [Service description]. Please press 1 to accept, 2 to retry."
8	Press the 1 to accept.
	Santrax will say: *"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".*
9	Press 2 for no.
10	Santrax will say: *"Thank you, bye."*
11	Hang up.

Visit Scenarios (SMC and Telephony)

<u>Multiple clients in the same home</u>

If a provider cares for more than one client in the same home (e.g. husband and wife), but not at the same time:

- SMC – the employee calls in and out for each client receiving care at that time.
- Telephony – the employee calls in and out, entering the Client ID of the client receiving care at that time.

The Client ID can be found by looking up the client's record in the Sandata EVV *Data Entry* module or running an *Active Clients Report* in the *Reports* module.

<u>Provider providing care multiple times for a single client in one day</u>

If a provider cares for a single client multiple times in one day:

- SMC – the employee calls in and out for each visit, capturing the visit hours and service performed.
- Telephony – the employee calls in and out for each visit, capturing the visit hours and service performed.

<u>Visit that starts and/or ends away from the client's home</u>

If an employee delivers care to the client outside the home, or picks up/drops off the client outside the home:

- SMC – the employee calls in and out from the client's location outside the home.
- Telephony – the employee calls in and out from the cell phone. Manual adjustments may need to be made in *Visit Maintenance*.

If neither SMC nor TVV are available, the agency provider enters the visit manually in *Visit Maintenance*.

<u>If one or more providers are providing like services to more than one client:</u>

- SMC- The employee uses the group visit functionality (see Chapter 9) to do one call-in and call-out for all the clients in the visit
- Telephony- The employee uses the group visit functionality (see Chapter 9) to do one call-in and call-out for all the clients in the visit

<u>If an employee provides care to a client that starts before midnight one day and ends after midnight the following day:</u>

- SMC – the employee will call in upon arriving and call out when leaving.

- Telephony – the employee will call in upon arriving and call out when leaving.

When an overnight service is provided to an individual under a Department of Developmental Disabilities (DODD) waiver, visits must not cross midnight. DODD requires all units to be billed on the date that they were provided. This means you must clock out at 11:59pm and clock back in at 12:00am when using EVV for DODD services.

Switching Services During a Visit

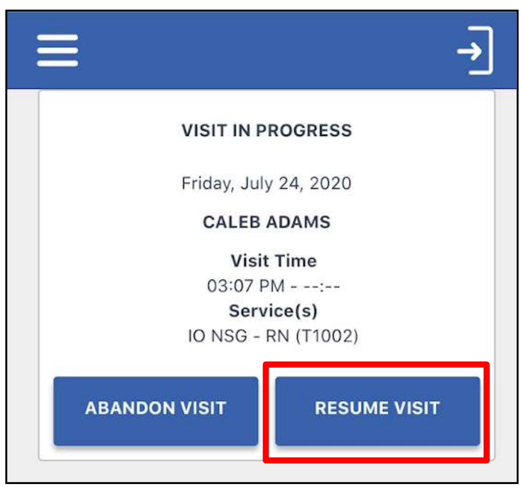
You may be authorized to provide more than one service during a visit. This can be recorded using Sandata Mobile Connect (SMC) and/or Telephonic Visit Verification (TVV). The services will appear as separate visits in Visit Maintenance, with unique call-in and call-out times.

When providing multiple services, you will record a clock-in, record each time you switch services, and record a clock-out. For example, for a visit with two (2) services, you will be making a total of three (3) calls.

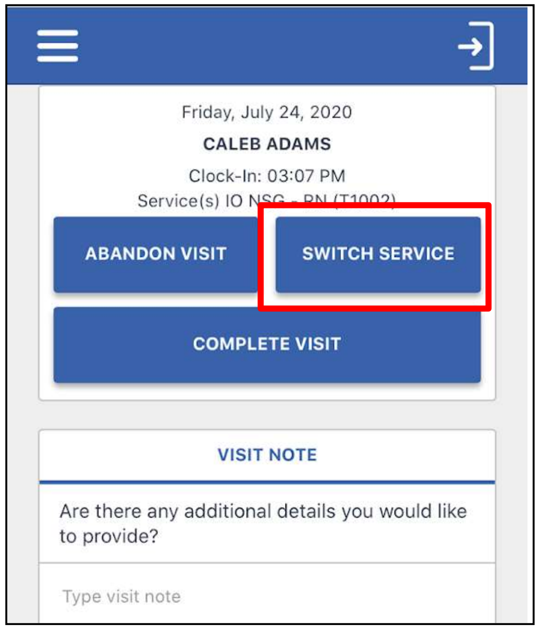
<u>Switching Services with Sandata Mobile Connect (SMC)</u>

The call-in process does not change. Log into SMC, search for the client, select the initial service, then tap **Start Visit**. When you are ready to switch services:

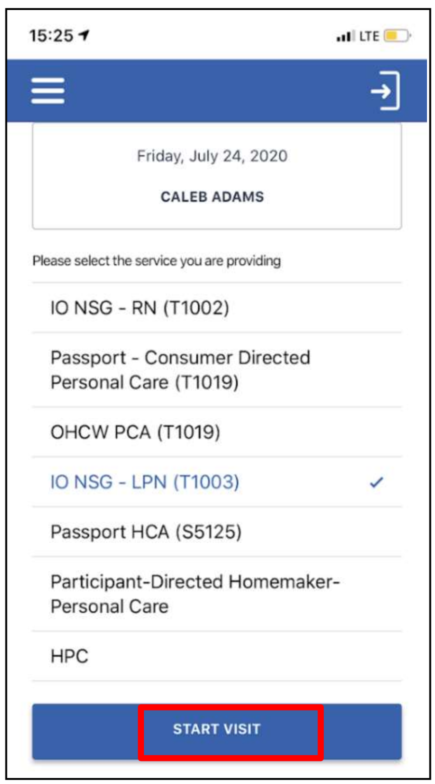
1. Log in to SMC. The Home screen shows the visit is in progress. Tap **RESUME VISIT**.



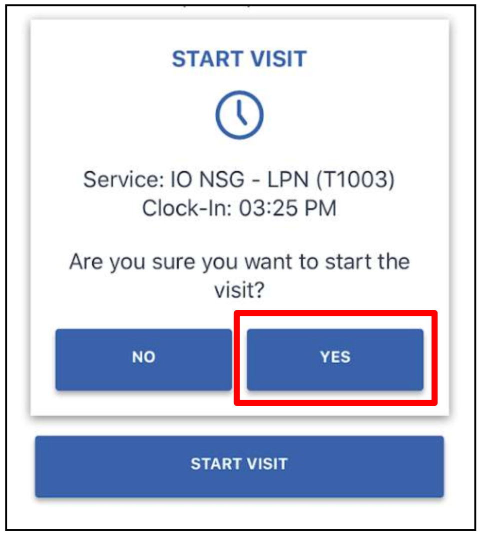
2. Enter Visit Notes if applicable, then tap **SWITCH SERVICE**.



3. Select the *Service* from the drop-down list, then tap **START VISIT**.



4. A pop-up appears with the start time. This will also be the end time of the previous service. Tap **YES**. The new service is now being recorded. The visit call-out process is the same as a single service visit.



Switching Services with Telephonic Visit Verification (TVV)

The initial TVV call-in process is the same, even if you plan to switch services. Dial the toll-free number associated with your agency, and call-in for the visit. When you are ready to switch services, dial the toll-free number associated with your agency, and answer the prompts. Note: you will still need to call-out at the end of the final service. The prompts related to switching services are listed in **bold.**

Multi-Service Switch	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: *" You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]."* After a brief pause, Santrax will say: "*Please enter first client ID or hang up if done.*"
6	Enter the Client ID number.
	Santrax will say: *"Please enter the Service ID."*
7	Press the three-digit ID of the care performed.

	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*
8	Press the 1 to accept.
	Santrax will say: ***"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".***
9	**Press the 1 to continue the visit with a new service.**
	Santrax will say: ***"Please enter the service ID."***
10	**Press the three-digit ID of the care performed. NOTE: This is ID for the NEW service being provided.**
	Santrax will say: ***"You entered [Service description]. Please press 1 to accept, 2 to retry."***
11	**Press 1 to accept. NOTE: From the point on, you will be calling out for the previous service.**
	Santrax will say: ***"Please enter second Client ID or hang up if done.***
12	**Hang up.**
Multi-Service Call Out	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: " *You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]."* After a brief pause, Santrax will say: " *Please enter first client ID or hang up if done.*"
6	Enter the Client ID number.
	Santrax will say: *"Please enter the Service ID."*
7	Press the three-digit ID of the care performed.
	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*

8	Press the 1 to accept.
	Santrax will say: ***"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".***
9	**Press 2 for no. You are calling out for the second service.**
	Santrax will say: *"Please enter second Client ID, or hang up if done.*
10	Hang up.

6 Visit Maintenance

Module Time

75 minutes

This lesson explains how to navigate the screens, understand the information presented on the screen for selected visits, and how to resolve exceptions that may be linked with a visit.

Module Objectives

After completing this lesson, you will be able to:

- search and review visit exceptions; and
- resolve visit exceptions.

Key Terminology

Term/Acronym	Definition
Client/Individual	A person who receives services through the Medicaid program.
Exception	Any visit data which Sandata EVV has denoted with a colored circle because it is either missing information or does not meet the rules established for the program.
Employee/Non-Agency Provider	A person who provides care to one or more clients.
Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged.

Introduction

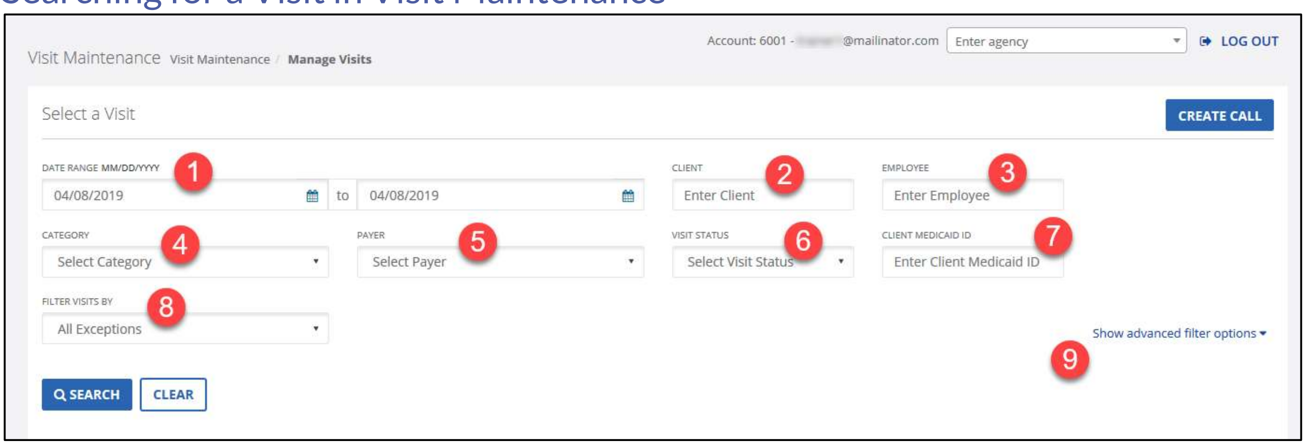
The Sandata EVV *Visit Maintenance* module is designed to give users the ability to review, modify and correct Sandata EVV visits. It allows you to monitor the current day's visit activity in real-time. It allows visits to be updated to ensure that all necessary information is included and any exceptions are corrected or acknowledged.

Visit maintenance should not be done while a visit is in process.

Sandata EVV is not used for billing and does not guarantee payment for a visit.

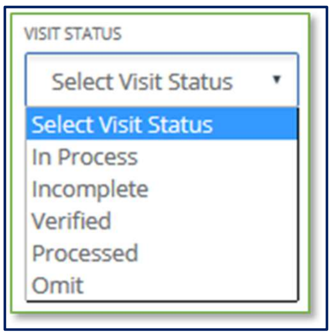
A visit includes a caregiver, a client, a service, GPS location (for SMC) or the telephone number (for TVV), and call-in and call-out times (date and time) from a client's location. As call-in/call-out times are received by Sandata EVV, exceptions are applied based on the business rules for the specific exception. For example, 'Visit without an In Call' exception would be applied if an out call is received in the absence of an in call. There are two types of exceptions, those that must be fixed and those that must be acknowledged. *Visit Maintenance* allows you to correct/acknowledge the exceptions on a visit so that it can be matched to the claim submitted for the visit.

Searching for a Visit in Visit Maintenance



In *Visit Maintenance*, search filters are used to set up parameters to find visits to review and are located on the top half of the *Visit Maintenance* screen. The search results include all data that falls within the specified parameters.

1. **DATE RANGE**: The date fields default to the current date and can be changed by clicking in the date field and typing the date or clicking on the calendar icon to select a date using the pop-up calendar.
2. **CLIENT**: Enter all or part of client's last name to filter the visit data for that client.
3. **EMPLOYEE**: Enter all or part of the caregiver's last name to filter the visit data for that caregiver. As a Non-Agency Provider, you will only see your own visit data.
4. **CATEGORY**: This field is not applicable for the Ohio EVV program.
5. **PAYER**: This drop-down contains a list of Payers. Selecting a Payer determines the options available in the **PROGRAM** filter under the *Advance Filter Options*.
6. **VISIT STATUS**: This filter allows a user to filter visits by their status. The options include:

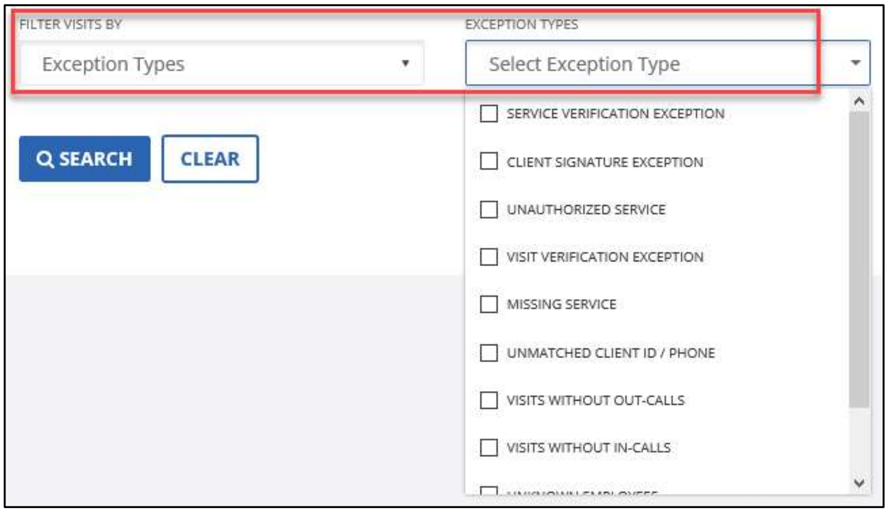


Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims validation engine at least once
Omit	A visit that is marked 'Do Not Bill'

7. **CLIENT MEDICAID ID:** Enter the client's 12-digit Medicaid ID.
8. **FILTER VISITS BY:**
   - **All Exceptions**: This default setting displays all visits containing one or more exceptions within a specified time period.

   The exceptions triggered for a visit are based on payer requirements.

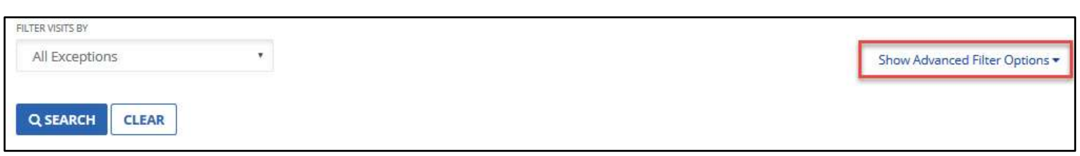
   - **Exception Types**: This option selects visits based on the exceptions which apply to the visit. When selected, an additional field appears prompting the user to choose the specific exception type(s) from the additional drop-down field.

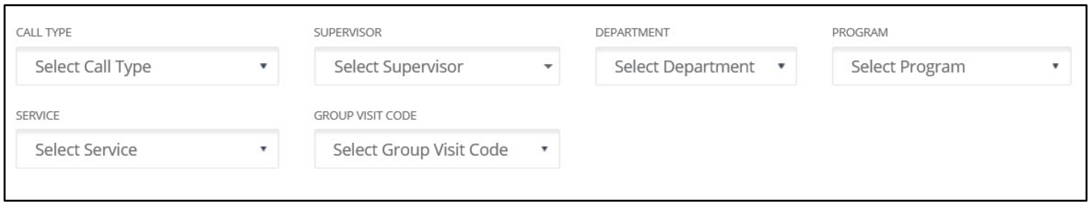


Exception	Description
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.
UNATHORIZED SERVICE	This exception occurs when a service is selected for a visit that does not match to the service the client receives. The exception must be fixed in the Visit Details screen.
UNKNOWN CLIENTS	Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.
UNKNOWN EMPLOYEES	Identifies when the Santrax ID entered during a Telephony call does not match to the Non-Agency Provider.
VISIT WITHOUT IN-CALLS	Identifies a visit which does not have a call-in.
VISIT WITHOUT OUT-CALLS	Identifies a visit which does not have a call-out.

- **All Visits:** Sandata EVV will show all visits (including those with exceptions) in the search results for a specified time period.

9. **Show Advanced Filter Options:** Displays additional filters such as **Call Type, Supervisor** and **Department**.

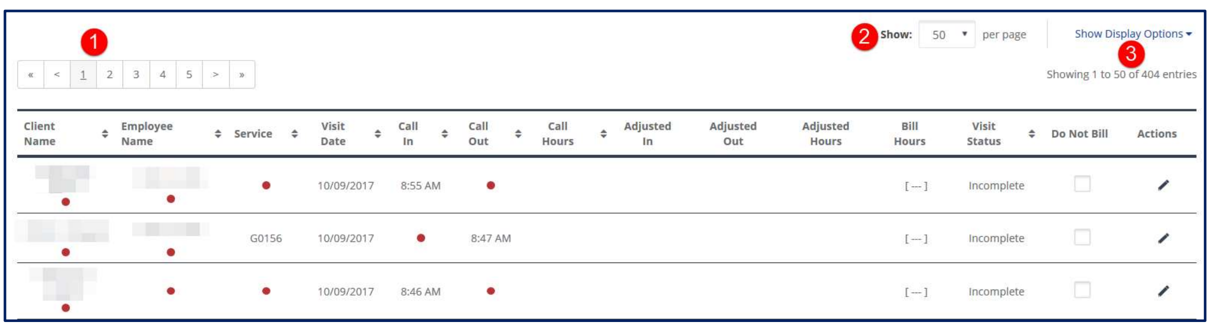




- **CALL TYPE**: Filter visits to show only **MVV** (mobile) or **Manual** calls.
- **SUPERVISOR**: This filter is not applicable for the Ohio EVV program.
- **DEPARTMENT**: This filter is not applicable for the Ohio EVV program.
- **PROGRAM**: Filter visits for a specific program from the drop-down list. Available options are based on the selection in the **PAYER** filter.
- **SERVICE**: Filter visits for a specific service from the drop-down list. Available options are based on the selection in the **PROGRAM** filter.
- **GROUP VISIT CODE**: Filter visits for a specific group visit code or select from the drop-down list. If the date range specified in the search filters is seven (7) days or less, the field will display a drop-down list. If the date range specified in the search filters is greater than seven (7) days, the group visit code will need to be type into the field.

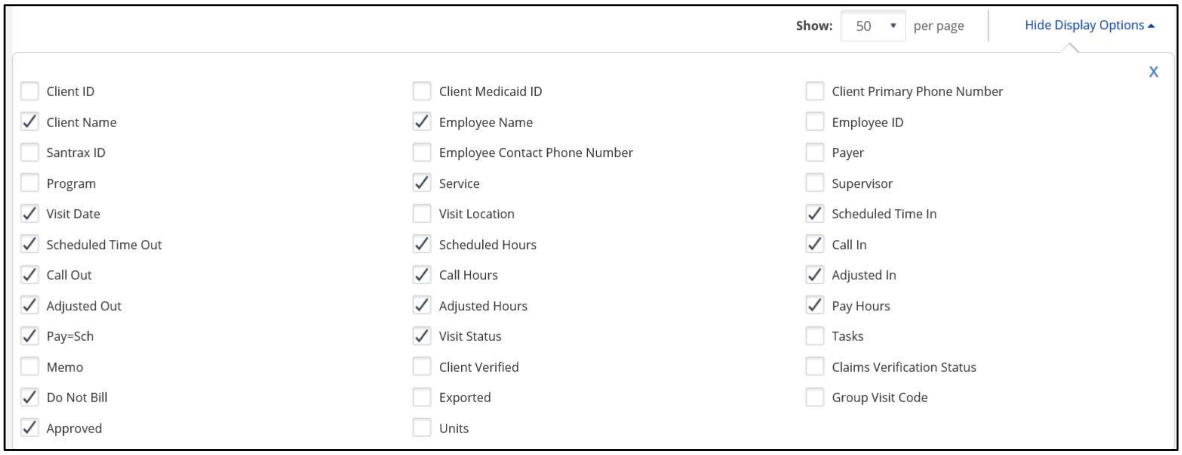
Understanding the Visit Grid

When the filters are applied and a search is performed, the results are displayed in the visit grid at the bottom portion of the screen.



The top of the visit grid displays the following options:

1. Pagination arrows are used to move forward/backward a page, jump to a specific page or first/last page.
2. Lines per page setting to adjust the number of lines per page (default = 50)
3. A **Show Display Options** link allows the user to select additional data elements to display in the visit grid.



Any additional data element selected from the **Display Options** link is only available during the current session. Upon logging out and logging back in to Sandata EVV, the visit grid returns to the default display. To keep the added display options, click **SAVE SETTINGS** in the Show Advanced Filter Options link.

TIP

Check the **Units** box to show the units as a column in the visit grid.

The data within the visit grid can be sorted by clicking on any of the following column headers:

- **Client Name**
- **Employee Name**
- **Service**
- **Visit Date**
- **Call-In**
- **Call-Out**
- **Call-Hours**
- **Visit Status**

TIP

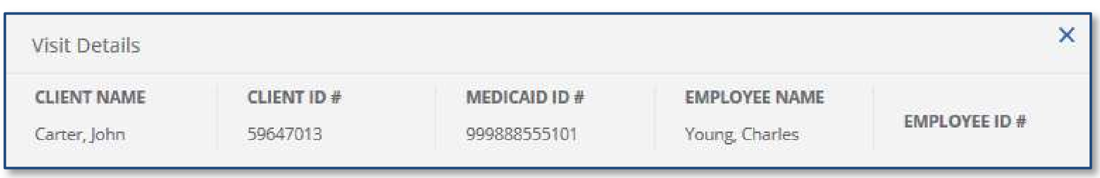
Hovering the mouse over an exception indicator displays a tool tip for that exception detail.

Understanding the Visit Details Screen

To view the details of a visit, either click on the visit line or click **Edit** to the right of the line to display the *Visit Details* screen.

When clicking on a data element on the visit line, the *Visit Details* screen opens directly to that section of the visit.

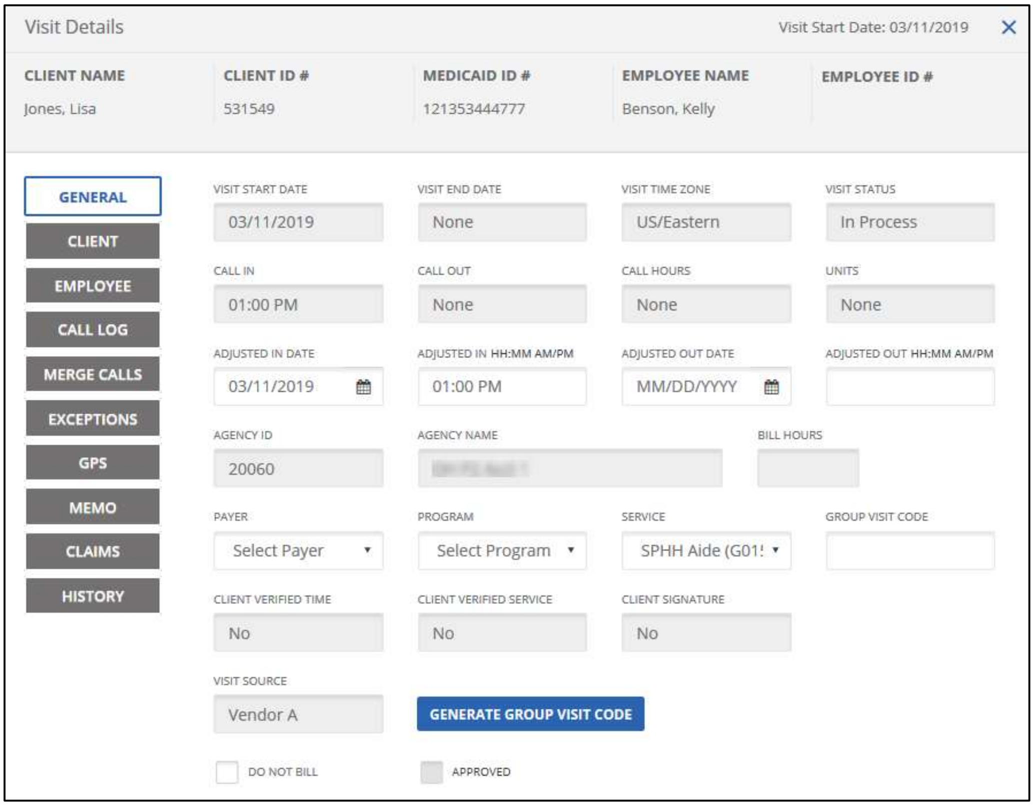
The top of *Visit Details* screen contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.



- *GENERAL:* contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, EMPLOYEE ID, SCHEDULE IN, SCHEDULE OUT, SCHEDULE HOURS, VISIT START DATE, VISIT END DATE, VISIT TIME ZONE, VISIT STATUS, CALL IN, CALL OUT, CALL HOURS, UNITS, ADJUSTED IN DATE, ADJUSTED IN, ADJUSTED OUT DATE, ADJUSTED OUT, AGENCY ID, AGENCY NAME, PAY HOURS, PAYER, PROGRAM, SERVICE, GROUP VISIT CODE, BILL CODE, VISIT SOURCE,**

SCHEDULE ID, DO NOT BILL and **APPROVED** (not applicable for the ODM program).

If the Service for a visit is associated with multiple payers, the **PAYER** and **PROGRAM** fields are editable to select values from the drop-down lists.



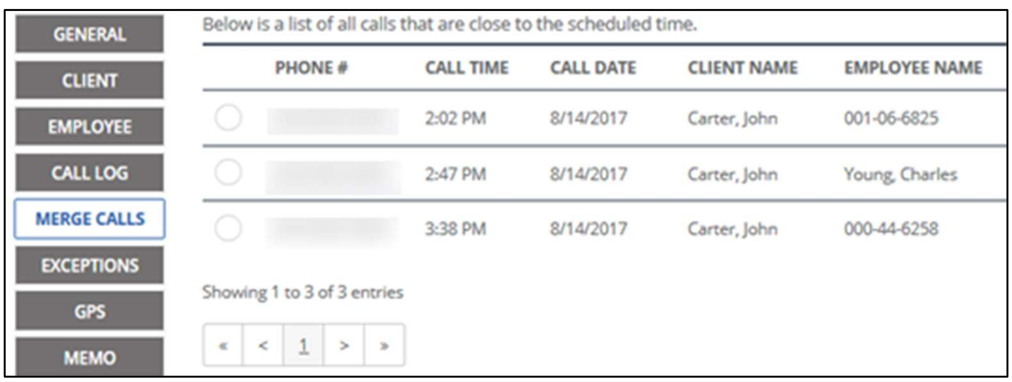
- *CLIENT:* This screen displays the client's details such as **ADDRESS, PHONE NUMBER** and **LANGUAGE PREFERENCE**.

The screen also includes an option to change the client for the visit, in instances when the client is unknown or was entered incorrectly and to include inactive clients in the search.

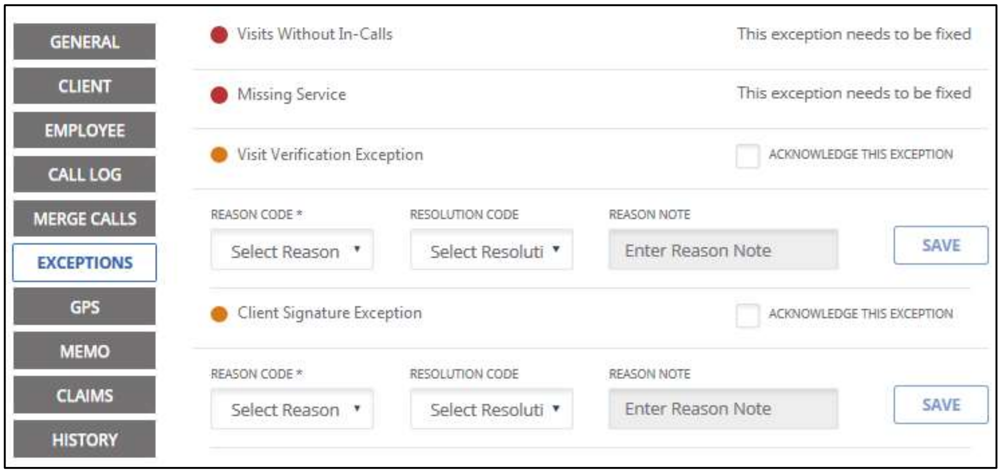
- *EMPLOYEE:* This screen displays the employee details such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.**

- *CALL LOG:* This screen shows the details of the call-in/call-out times and the type of call (Mobile, Telephony or Manual).

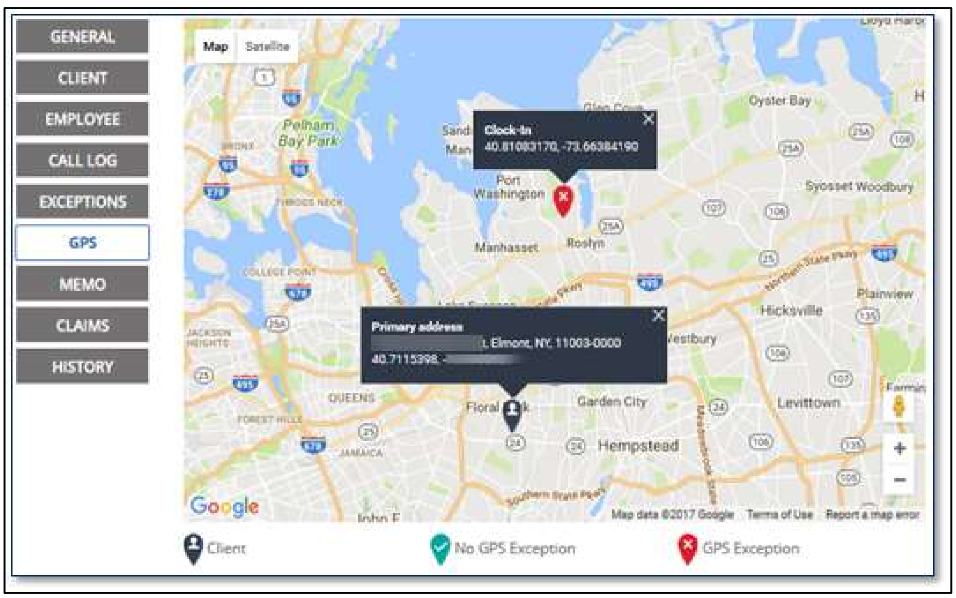
- *MERGE CALLS:* This screen This screen appears if a visit is missing a call time. It shows a list of available calls that may be merged to the visit. Calls can be merged if there are within time proximity and not associated with any other visit.



- *EXCEPTIONS:* This screen lists all the visit exceptions for the visit, along with the available option to resolve each exception.

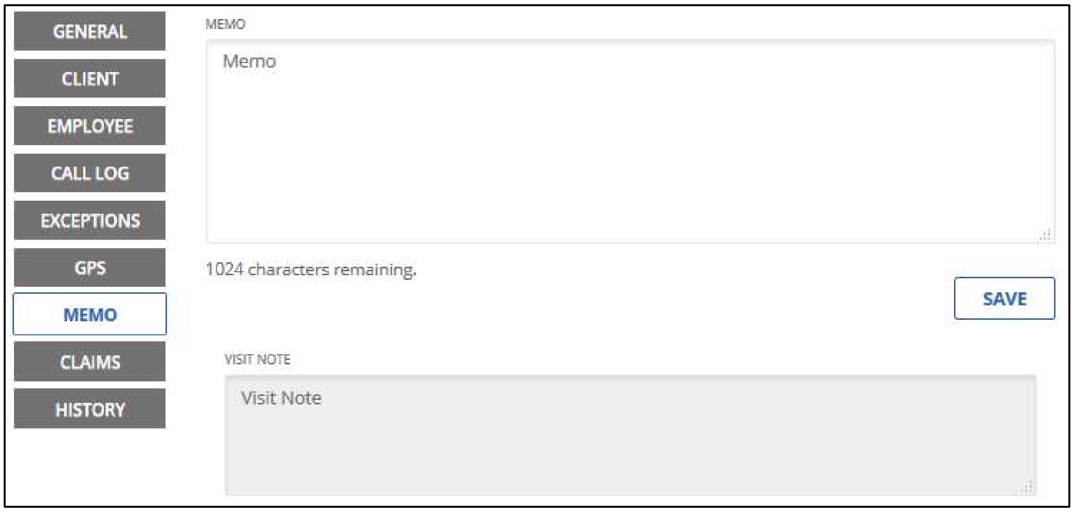


- *GPS:* This screen shows the location of the SMC call-in/call-out times relative to the client's home.

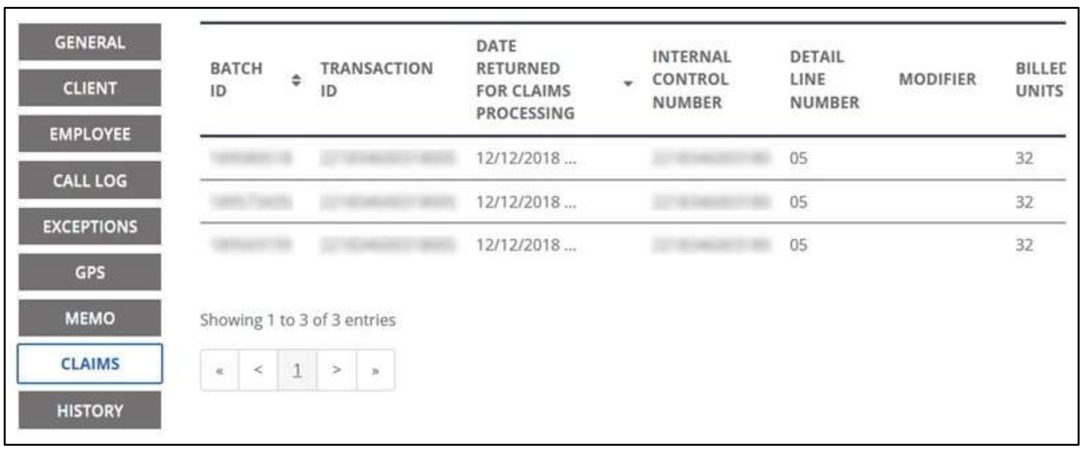


- *MEMO:* This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a *Visit Note* screen which displays notes entered into SMC during call-out.

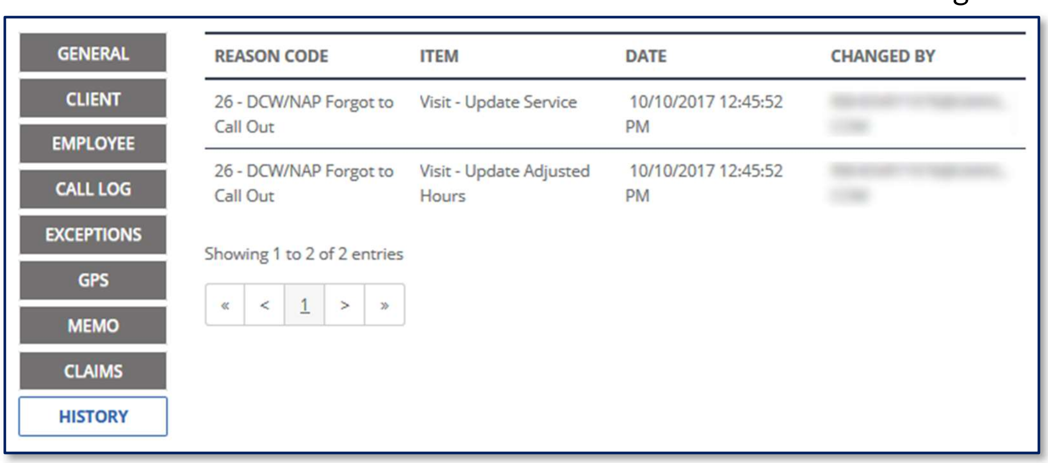
This information should not be used to fulfill ODM documentation requirement.



CLAIMS: This screen shows the batch, transaction and date/time each time the visit was returned to the MITS adjudication system.



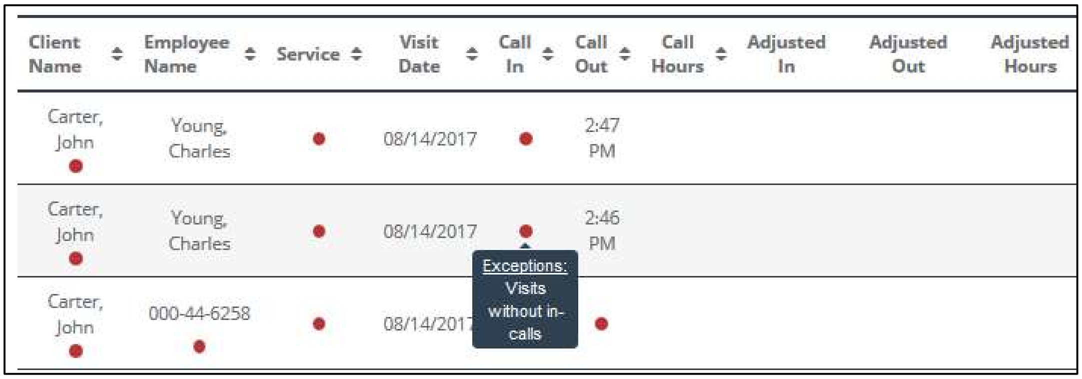
- *HISTORY*: This screen contains the audit history for the visit. Any change made to the visit is tracked and listed on this screen with the most recent change at the top.



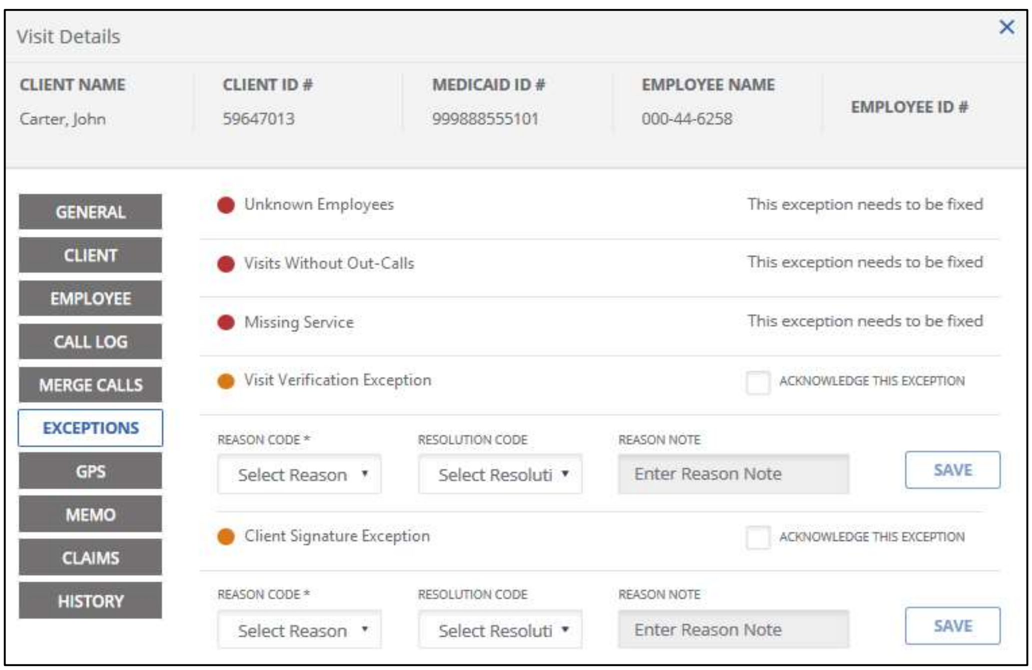
Identifying Exceptions

Visit exceptions are indicated by a colored circle under one or more columns where the exception exists.

- An exception indicates the visit is missing information or the information captured does not meet program requirements.
- A visit may have one or more exception(s).
- Hovering over an indicator displays a pop-up showing the description of the exception(s).

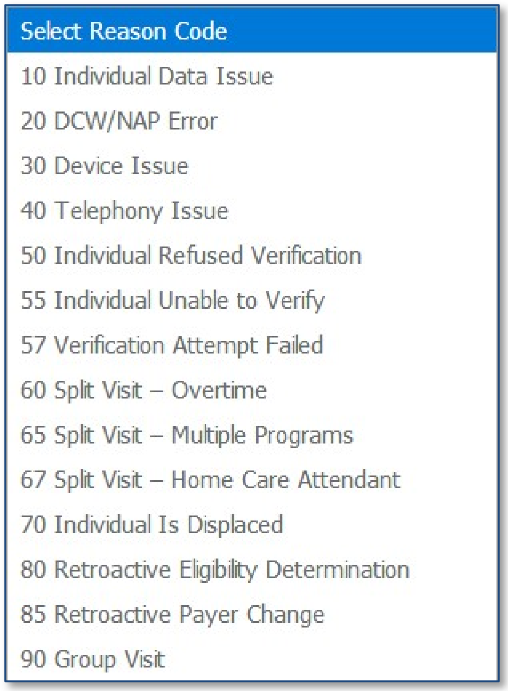


- Visit exceptions can also be reviewed by clicking the **Exceptions** link when viewing the *Visit Details* screen.



Correcting Exceptions

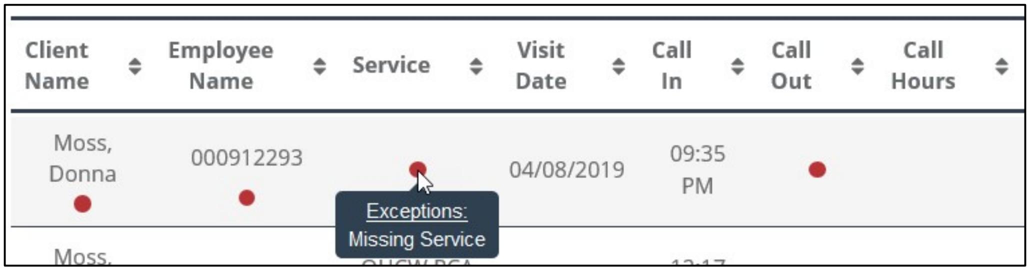
The condition causing the exceptions must be fixed or where it is not possible, acknowledged before a visit is matched to a claim. Every visit adjustment or correction requires the user to select a reason code, resolution code and in some cases, additional notes. The available reason codes are:



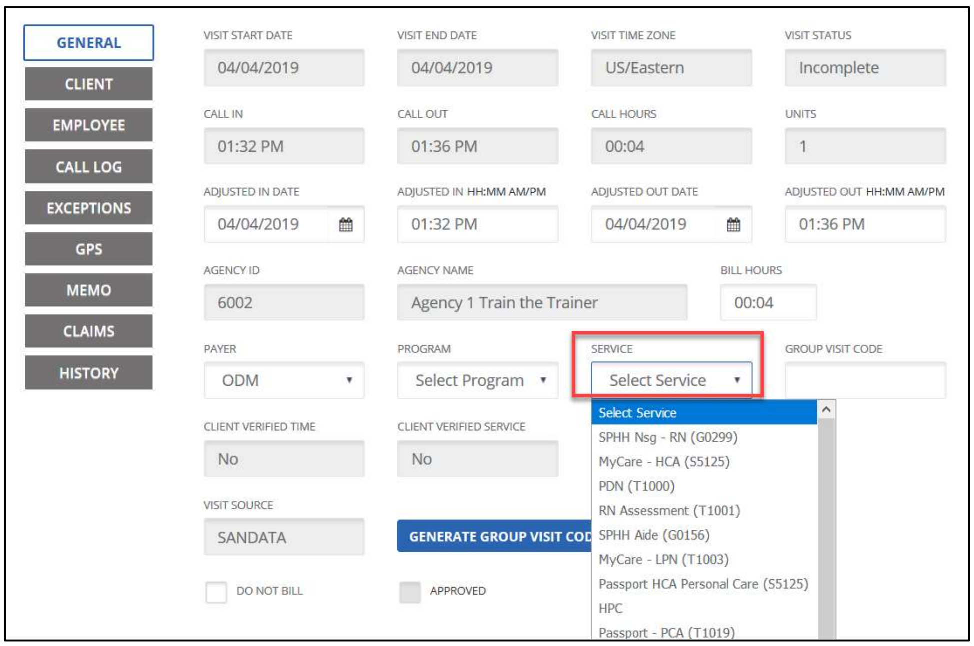
Missing Service Exception

Identifies when the service provided for the visits is not specified during the SMC call-in or Telephony call-out.

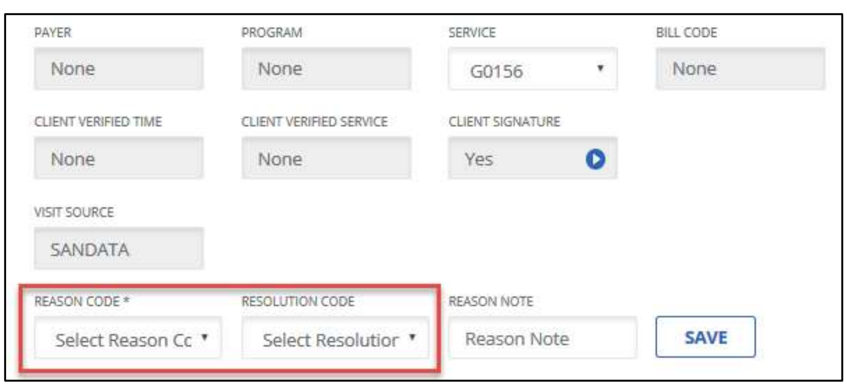
1. Click the exception indicator under the **Service** column.



2. Select the correct service from the **SERVICE** field drop-down list.



3. Select the **REASON CODE, RESOLUTION CODE,** and **REASON NOTE**, if required.

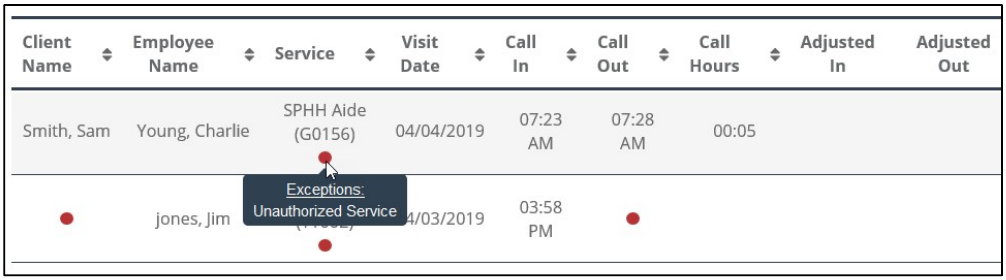


4. Click **SAVE**.

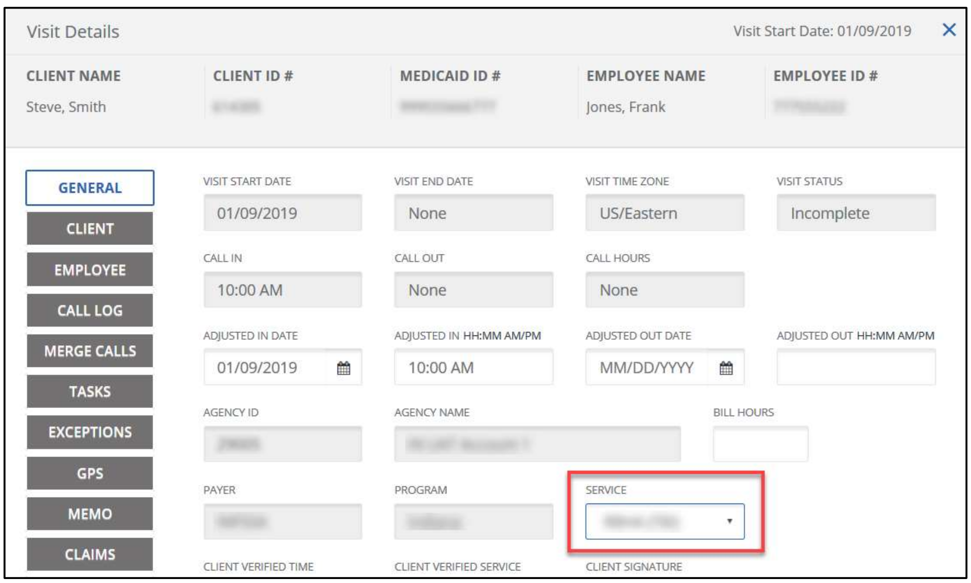
Unauthorized Service Exception

Identifies when the service selected is not valid for the client. Valid services are based on the client's association to one or more payers and their associated services.

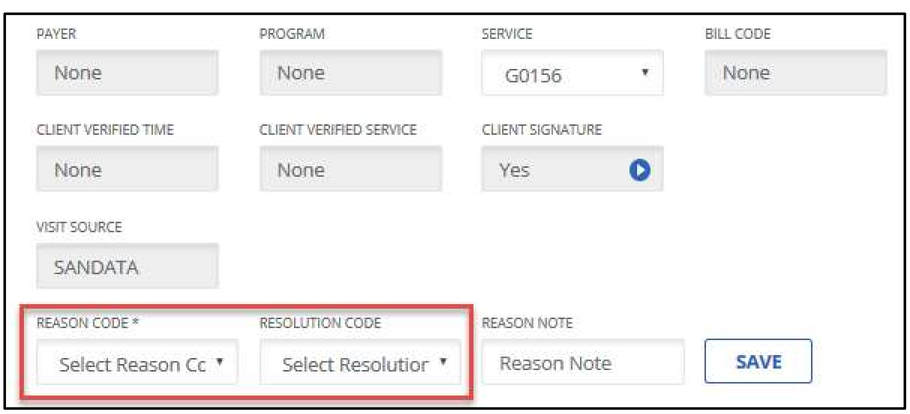
1. Click the exception indicator under the **Service** column.



2. Select the appropriate service from the drop-down list. Note that the authorized services for the client must be received to fix this exception.



4. Select the **REASON CODE, RESOLUTION CODE,** and **REASON NOTE**, if required.

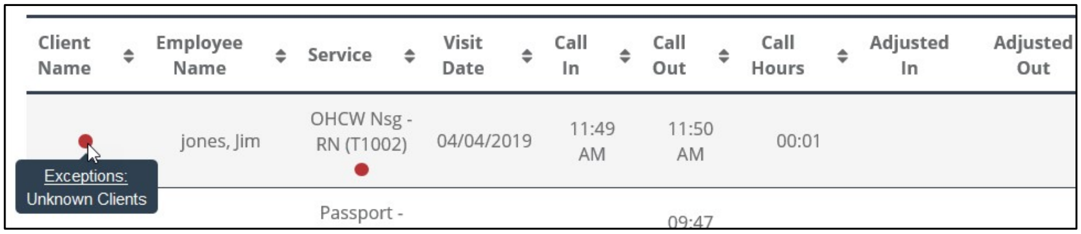


5. Click **SAVE**.

Unknown Client Exception

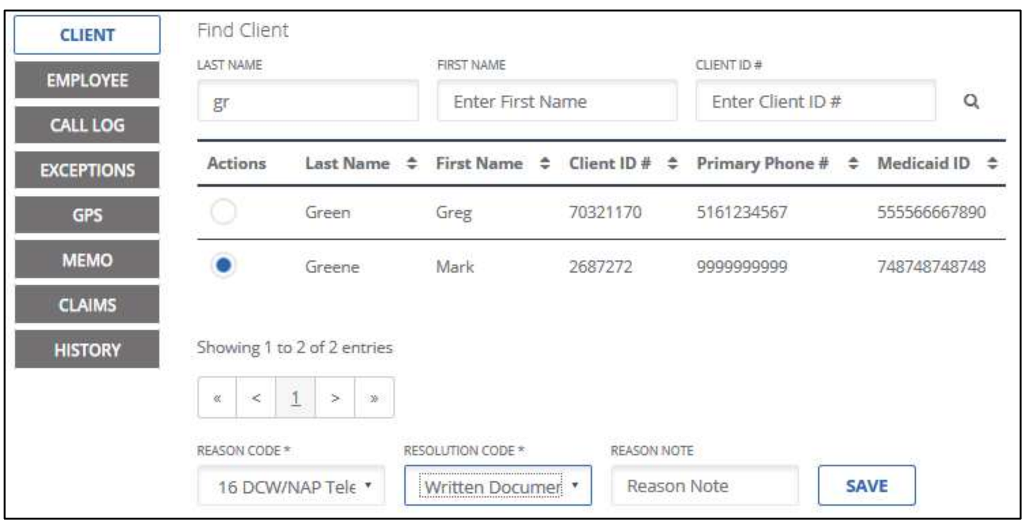
Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.

1. Click the exception indicator under the unknown ID under the **Client Name** column.

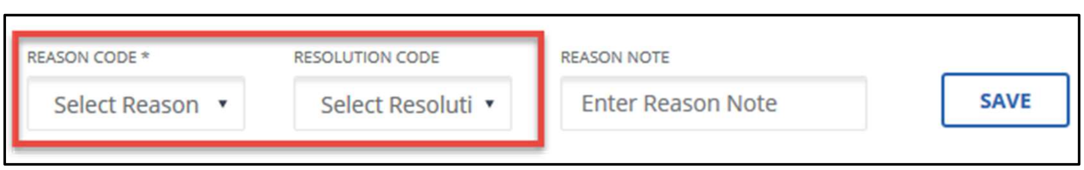


2. Use the search fields to search for the client.

3. Select the client from the search results.



4. Select the **REASON CODE, RESOLUTION CODE,** and **REASON NOTE**, if required.



5. Click **SAVE**.

Visit Without In-Call/Visit Without Out-Call

Identifies a visit which does not have a call-in or call-out time.

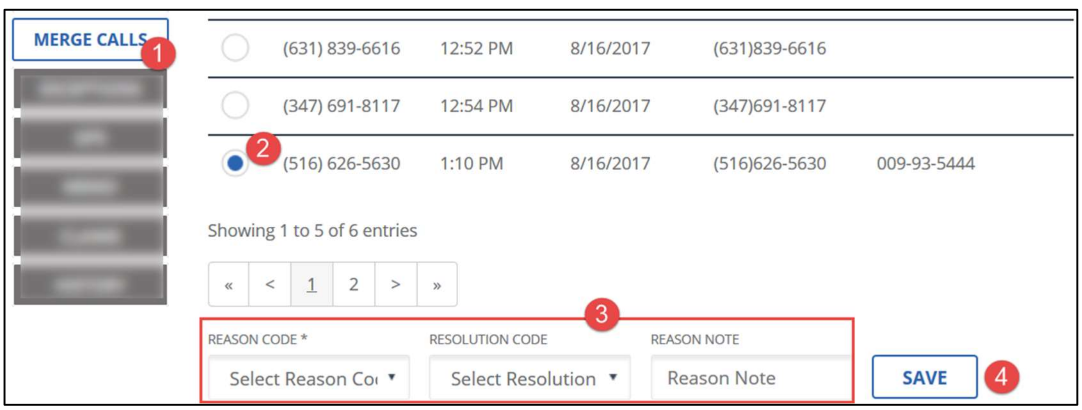
When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time.

Merge Calls

The **MERGE CALLS** screen appears if a visit is missing a call-in or call-out time. This screen displays available unknown calls that may be inserted/merged with the visit, after proper follow up confirming that care was provided.

From the *Visit Details* screen:



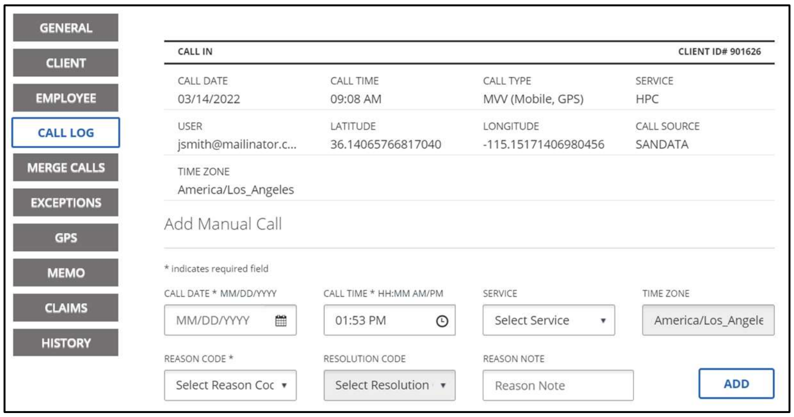
1. Click the **MERGE CALLS** link to see if there are any available calls that can be merged to the visit.
2. Click the radio button next to the line to select the call, if there is a call to merge.
3. Select the **REASON CODE**, **RESOLUTION CODE** and **REASON NOTE**, if needed.
4. Click **SAVE.**

Add Manual Call

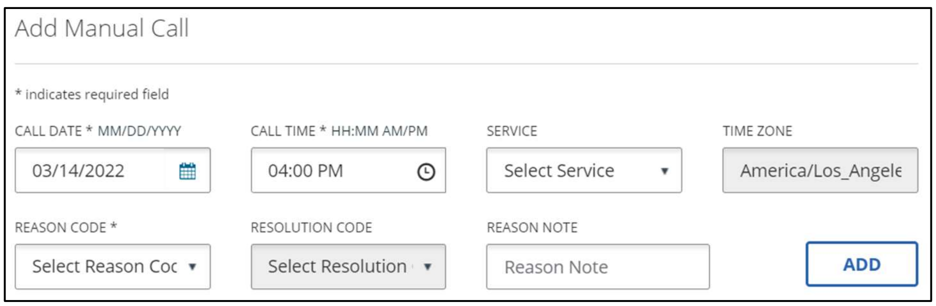
When a visit is missing a call time and there is no appropriate that can be merged, a manual call must be added. Once a visit has both calls, the bill hours are calculated for the visit. There may be additional exceptions associated with the visit that need to be fixed or acknowledged for the visit to be matched to a claim.

From the *Visit Details* screen:

1. Click **CALL LOG**.



2. Enter the **CALL DATE** and the **CALL TIME**.



3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if required.

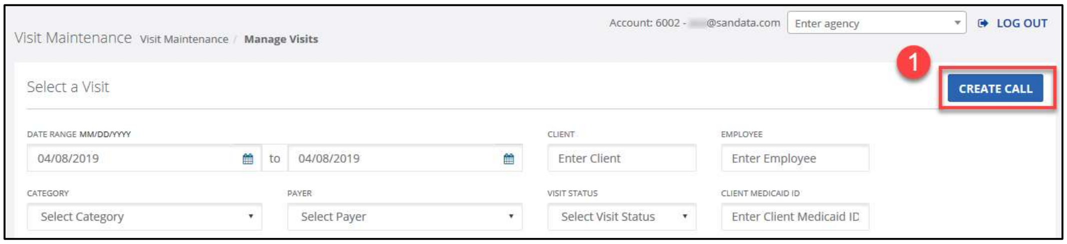
4. Click **ADD**.

Create Call

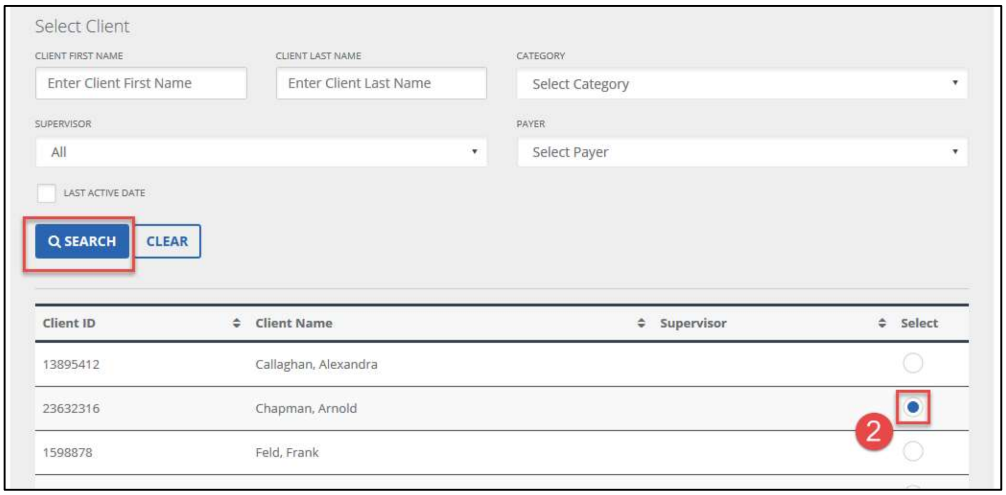
The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred, but the employee did not call-in or call-out.

From the Visit Maintenance homepage:

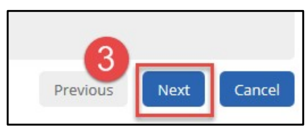
1. Click **CREATE CALL**.



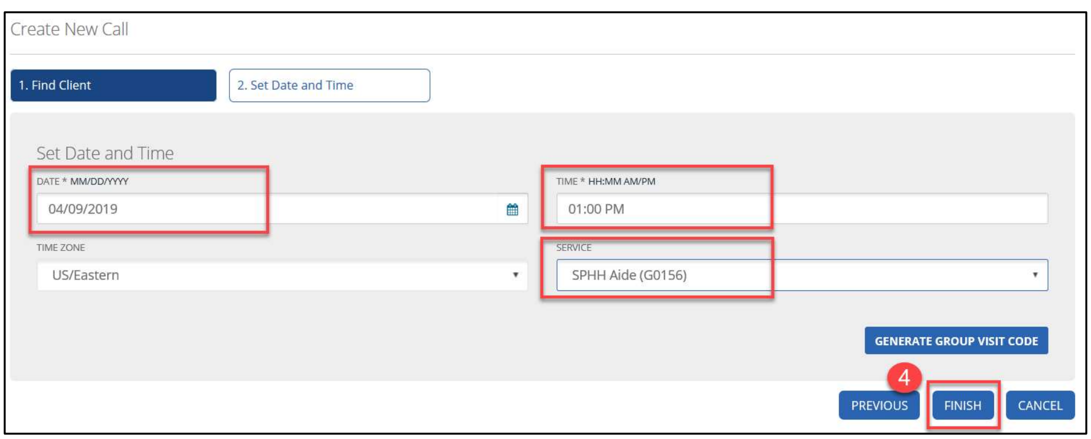
2. Search for and select a client.



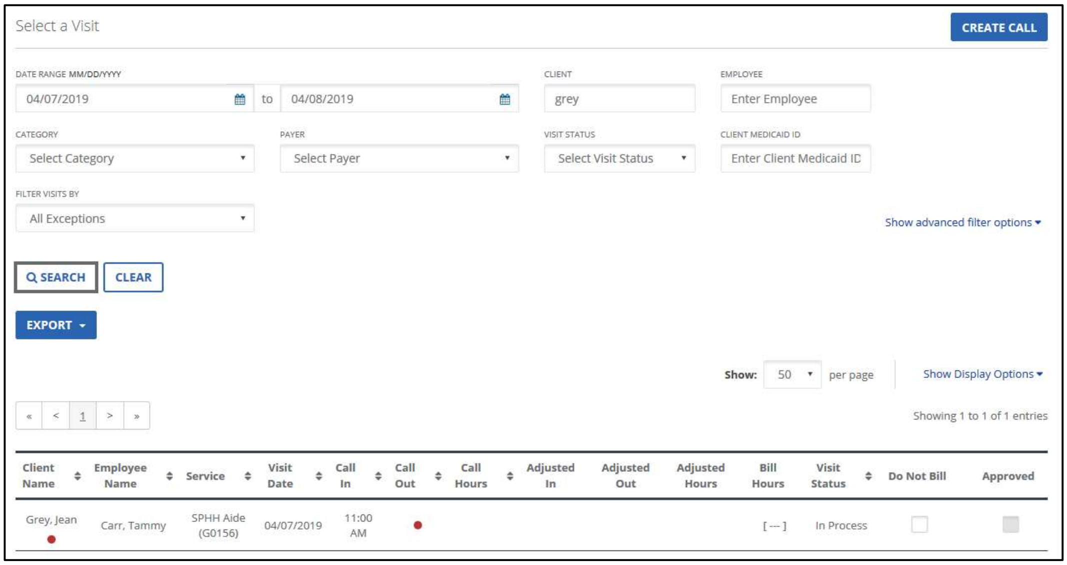
3. Click **Next.**



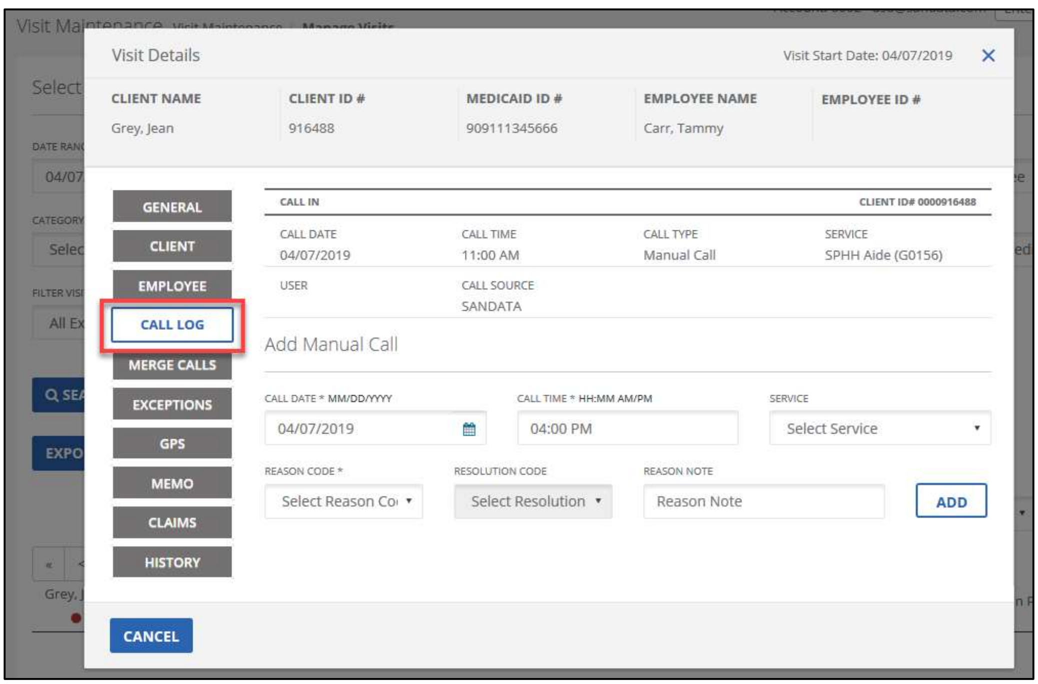
4. Select the date, time and service (based on Payer from client record) for the visit and click **FINISH**.



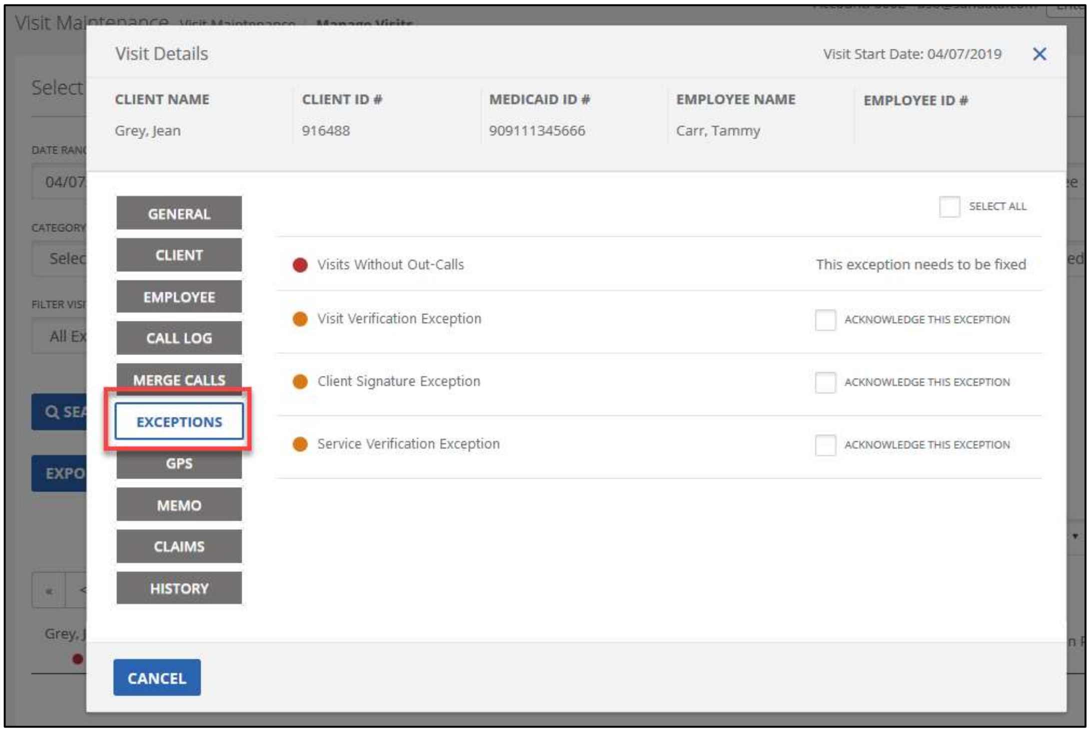
5. Click **OK** to save changes.
6. Search for your newly created call using the Visit Maintenance filters.



7. Click on the visit record to display the *Visit Details* screen and go to the **CALL LOG** screen to add a call-out.

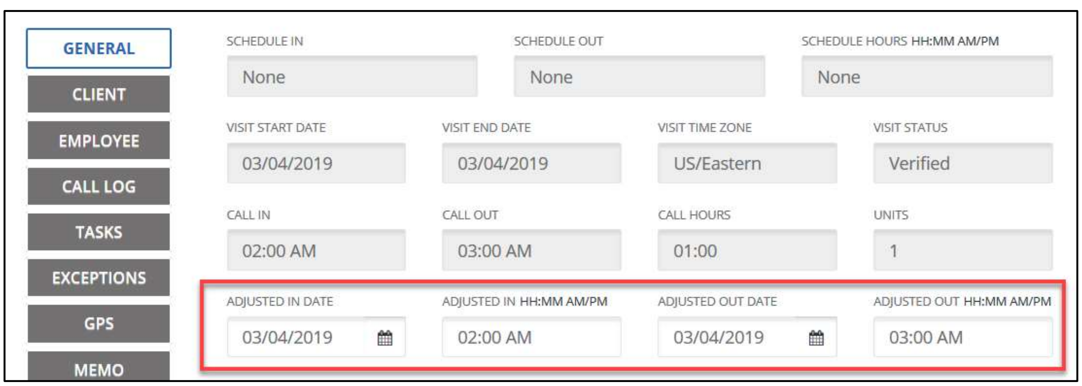


8. Click the **EXCEPTIONS** screen to review and clear the exceptions for the visit. (Exceptions will vary based on the client's specified payer)



Entering Adjusted Times

If the call times for a visit do not reflect the actual start and/or end times (for example, a call in was recorded late because the client was using the telephone), you can enter an **ADJUSTED IN** and/or **ADJUSTED OUT** on the General screen. Sandata EVV will add the adjusted time entered and actual call time to recalculate the visit duration.



From the *Visit Details* screen:

1. Click **GENERAL**.
2. Enter the appropriate information into the Adjusted Date(s) and/or Time(s) fields.
3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

7 Reports

Module Time

20 minutes

This lesson demonstrates how to generate Sandata EVV reports. At the end of the lesson there are report descriptions.

Module Objectives

After completing this lesson, you will be able to:

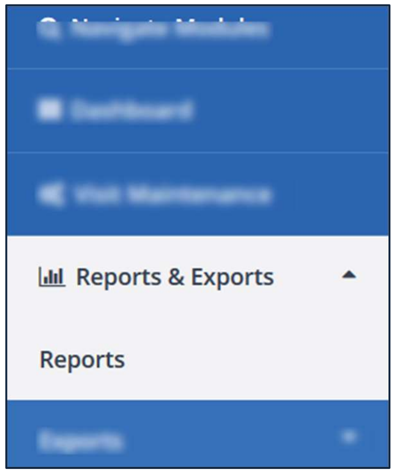
1. access reports;
2. use Daily and Date Range reports; and
3. sort and filter reports.

Introduction

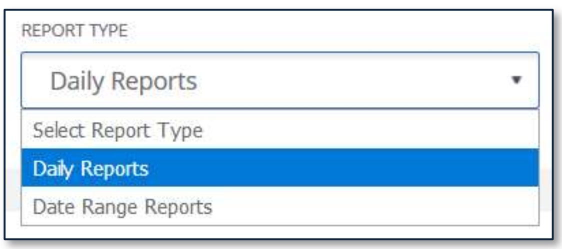
There are multiple reports available within Sandata EVV. Different users may have access to different reports. When reports are generated, they can either be saved as a portable document file (.pdf), Excel (.xls) or a comma delimited file (.csv). There are also multiple filters that enable the user to retrieve only the data they want to see.

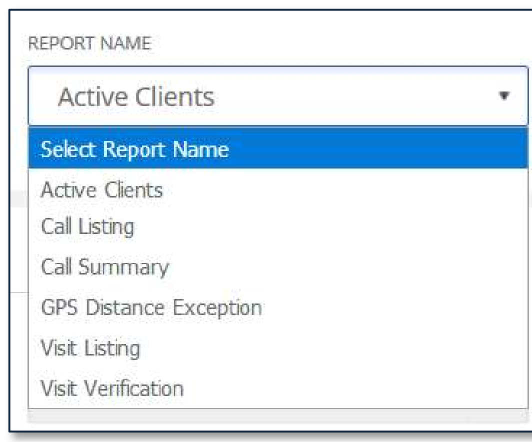
Accessing Reports

1. Click **Reports & Exports>Reports** from the *Navigation* panel. The *Reports* screen displays.



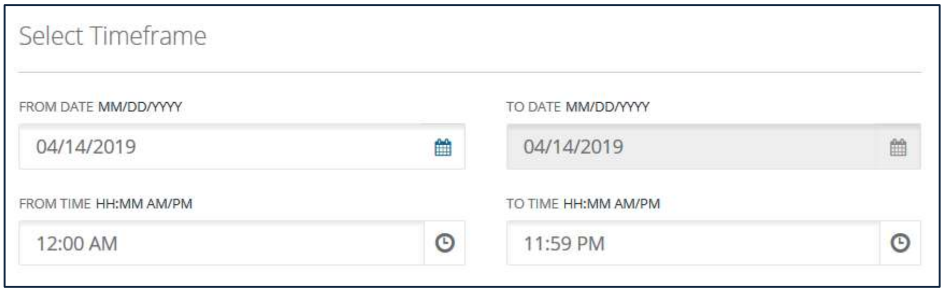
2. Select the **REPORT TYPE** and **REPORT NAME**.





Available reports differ depending upon which report type is selected.

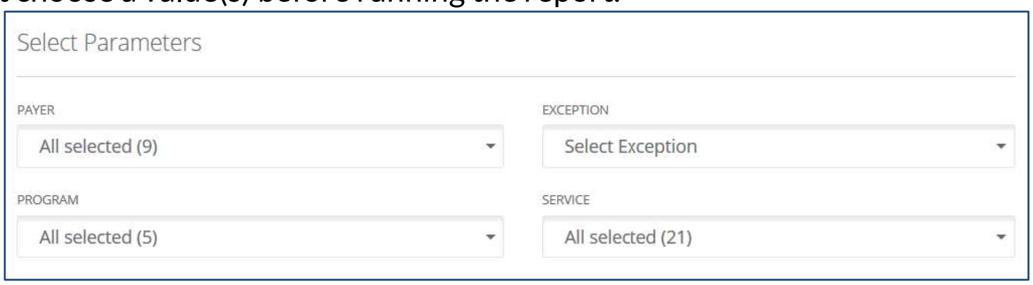
3. Enter **Select Timeframe** information.



For *Daily* reports, the default is always the current day's date. For *Date Range* reports, the default is the past two (2) weeks. Both types of reports can be filtered further by entering time constraints.

Maximum date range is 730 days.

4. Set the desired search **Parameters**. When a parameter field shows "select" you must choose a value(s) before running the report.



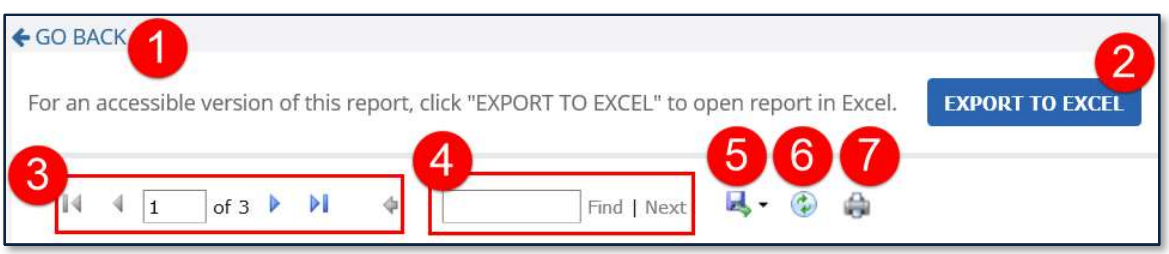
TIP

Parameters vary based on the report selected.

To reduce the size of the report and ensure efficiency when running reports with longer date ranges or containing lots of data, it is best to select other parameters such as: **CLIENT** or **CLIENT MEDICAID ID**.

5. Click **Run Report**. The *Preview Report* screen opens.

Navigating a Report



1. **Go Back**: This links closes the *Preview Report* screen and re-displays the report search parameters.
2. **EXPORT TO EXCEL:** This button produces an accessible version of the report in Microsoft Excel.
3. **Page Navigation:** This section will display the current page vs. the total number of pages. Navigate to a specific page by typing a number into the current page field and pressing <**Enter**>. The arrows can be used to navigate to the first, next, previous and last page.
4. **Search Functionality:** Allows you to find data on any page in the report. The **Next** button jumps to the next instance of the search criteria within the document.
5. **Export:** The report can be exported into several formats:

TIP

If all report data is to be in a single table, export as CSV (comma delimited) and open in MS Excel.

6. **Refresh:** Re-runs the report and renews the displayed data.
7. **Print:** Use this button to print the report.

The print icon is not available in the tool bar for Firefox and Chrome users. Firefox and Chrome users should export the report to PDF and use the PDF print tools.

Sorting a Report

1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Clicking a column's header will sort the results in either ascending or descending order based on that column's content.

If the column header has no arrow ( ) next to it, the column cannot be sorted. When a column is sorted, a visual indicator (/) reveals which column and in which order it is sorted.

Sample Available Reports

Role and security level determine the reports available. The reports support monitoring of visits in the field to ensure that clients are receiving the services as required. The reports also help put together the missing pieces in Visit Maintenance.

Daily Reports

Active Clients Report: This report lists all active clients as of the date selected.

Use this report to view all client's phone numbers, active addresses, identify whether an address was verified by GPS, the client's Medicaid ID (for SMC). Client ID (for TVV) and the Client Alternate ID if available.

Report Parameters
Account: 9634
For: 3/7/2019 - 3/7/2019 11:59:59 PM

ACTIVE CLIENTS

Account: Provider Training-Agency 39 (9634)

CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
[illegible]	[illegible]	[illegible]		[illegible]	Whitehall	OH	43213-0000	39.969479	-82.88787490	
[illegible]		[illegible]	[illegible]							
[illegible]		[illegible]								
[illegible]		[illegible]	[illegible]							
[illegible]	[illegible]	[illegible]		[illegible]	Columbus	OH	43219-0000	39.99078480000001	-82.94719529999999	
[illegible]		[illegible]	[illegible]							

Active Employees Report: This report displays all active employees for the selected date. The report displays the employee ID, employee name, employee email address, phone number and Santrax ID.

Use this report to view current employee information and review the employee email address (for SMC) and employee Santrax ID (for TVV).

Report Parameters
Account: OHIO QA Template Agency 1(10010)
For: 3/4/2019 12:00:00 PM - 3/4/2019 12:00:59 PM

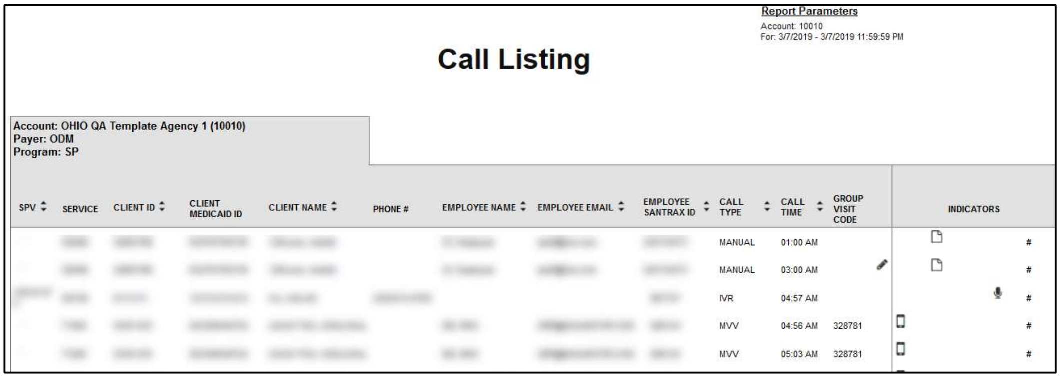
ACTIVE EMPLOYEES

Account: OHIO QA Template Agency 1 (10010)

EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	PHONE #	DEP
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-

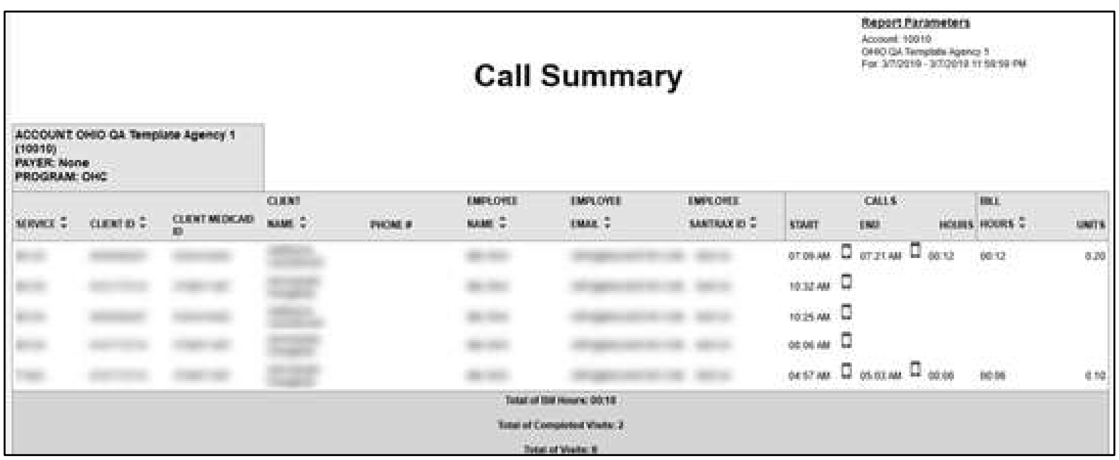
Call Listing Report: This report displays all call activity from all available call methods for the selected day and time range specified. The calls are listed one after another individually with the beginning pages listing calls with missing data.

Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification or exception handling.



Call Summary Report: This report pairs the Start and End calls and calculates the hours worked.

Use this report to review current visit information on a daily basis and identify the incomplete visits from the previous day that need correction or follow up. This report allows users to monitor trends in call activity and exception handling.



GPS Distance Exception Report: This report shows mobile calls that were made from a location that does not match to an active client's address.

Use this report to review calls that were made outside of the expected distance tolerance from a client address. The report captures the client, employee, visit date, call time, service and closest client address.

Date Range Reports

Client Visit Summary: This report shows all visits for the selected date range sorted by client, with each client on its own page. Results are sorted per visit, per service. The report includes basic information such as: visit date, employee Santrax ID, employee email, employee name, visit date, number of visits and visit hours.

Use this report to review visit hours and information by client. It is a useful tool to review what service were provided to a client for a given time. It also assists in monitoring trends in the services clients are receiving.


Report Parameters
Account: 10010
For: 3/7/2019 - 3/7/2019 11:5

Client Visit Summary

Account: OHIO QA Template Agency 1 (10010)
Payer: ODM
SPV: None
Client ID:
Client Medicaid ID:
Client Name:

PROGRAM	SERVICE	EMPLOYEE SANTRAX ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS
OHC					03/07/19		02:00
					Client Totals:	1	02:00
					Grand Totals:	**1**	**02:00**

Detail Visit Status Report: This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as, exceptions, services, date, time and the actual/adjusted call-in and call-out times.

Use this report to review a detailed overview of all visits within a selected date range. It assists in easily identifying visits that have statuses that need to be corrected. The report can also be printed based on exceptions or visits that need exception handling to get them to a verified status for claims validation.

Report Parameters
Account: 10010 - OHIO QA Template Agency 1
For: 3/7/2019 - 3/7/2019 11:59:59 PM
Visit Status: All

Detail Visit Status

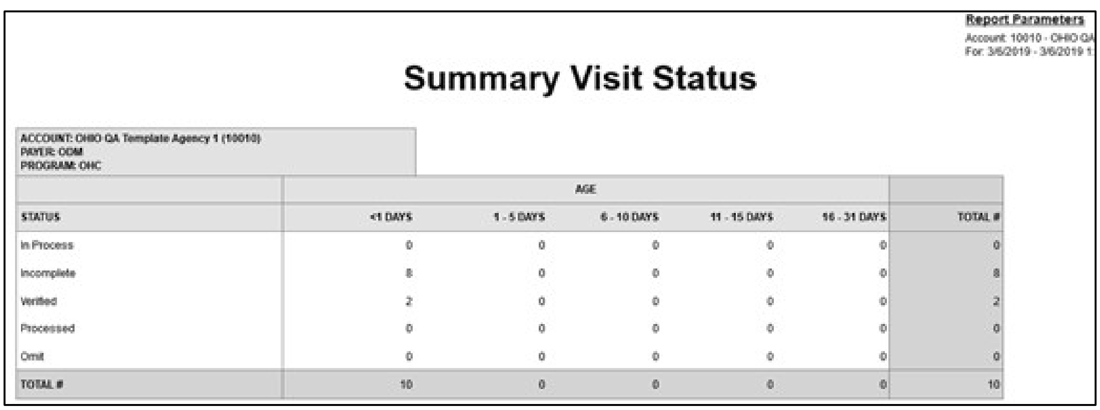
ACCOUNT: OHIO QA Template Agency 1 (10010)
PAYER: None
PROGRAM: None
SPV: None
STATUS: In Process

VISIT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	SERVICE	GROUP VISIT CODE	VISIT DATE	SCHEDULED START	SCHEDULED END	CALL START	CALL END	ADJUSTED START	ADJUSTED END	UNRESOLVED EXCEPTIONS
1873352524							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873325904							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873336138							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls

Sub Total # of Visits: 4

Summary Visit Status Report: This report is a summary view of the status of all visits based on the selected date range and parameters. The results are grouped by the duration of time each visit has remained in the same status. It shows visits in a 31 day or monthly range.

Use this report to review the status of all visits within a selected date range at a summary level. The report provides an easy way to quickly identify those visits requiring exception handling. When visits are identified, users can run a more detailed report for that specific visit to identify and correct exceptions.



Report Parameters
Account: 10010 - OHIO QA
For: 3/6/2019 - 3/6/2019 1

Summary Visit Status

ACCOUNT: OHIO QA Template Agency 1 (10010)
PAYER: ODM
PROGRAM: OHC

STATUS	AGE: <1 DAYS	1 - 5 DAYS	6 - 10 DAYS	11 - 15 DAYS	16 - 31 DAYS	TOTAL #
In Process	0	0	0	0	0	0
Incomplete	8	0	0	0	0	8
Verified	2	0	0	0	0	2
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
TOTAL #	10	0	0	0	0	10

Visit Log Report: All visits associated with each client within the selected date range are listed with one client per page in this report.

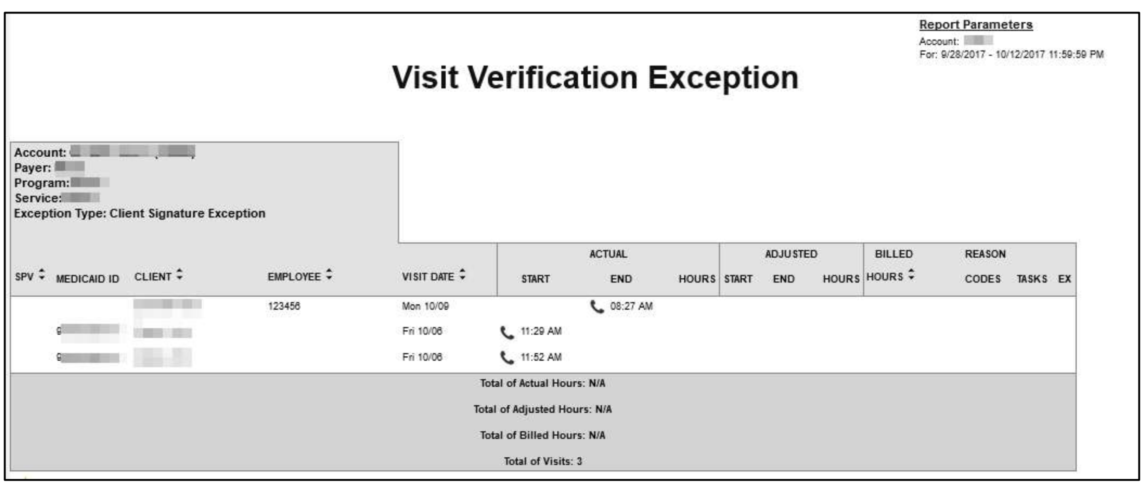
Use this report to track your client's visits by monitoring call times, bill information and reason codes applied.

Visit Verification Activity Summary Report: This report contains a list of modifications for each visit. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.

Use this report to review visit modifications. It includes what change was made, who made the change, when and why the change was made and the reason code related to the change.

Visit Verification Exception Report: This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.

Use this report to review the visit verification information and activity for a date range. It lists currently applied exceptions. Visits with multiple exceptions appear on multiple pages.



Visit Claims Verification Status Report: This report lists all visits within selected date range regardless of the visit's status and shows the last time each visit was returned to the payer for validation.

Use this report to track what visits have been matched to the claim for a visit or the remaining balance to reconcile outstanding claims.

Report Parameters
Account:
For: 9/28/2017 - 10/12/2017 11:59:59 PM
Visit Status: In Process,Incomplete,Verified,Processed,Omit

Visits Claims Verification Status

Account:
Provider Medicaid ID:

Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Visit Start	Visit End	Visit Status	Batch ID	Transaction ID	Visit Verified Date
						10/02/2017	11:42 AM	11:44 AM	Verified			
						10/09/2017	08:24 AM		Incomplete			
						10/09/2017		08:25 AM	Incomplete			
						10/06/2017	03:32 PM		Incomplete			
						10/09/2017		08:27 AM	Incomplete			
						10/09/2017		08:29 AM	Incomplete			
						10/09/2017		08:47 AM	Incomplete			
						09/28/2017	05:16 PM		Incomplete			
						10/06/2017	11:29 AM		Incomplete			
						10/09/2017	08:46 AM		Incomplete			
						10/03/2017	12:00 PM	12:19 PM	Verified			
						10/06/2017	03:30 PM		Incomplete			
						09/28/2017	04:59 PM		Incomplete			
						10/02/2017	11:33 AM	11:35 AM	Incomplete			

8 Group Visits

Module Time

60 minutes

This lesson demonstrates how to utilize the Group Visit functionality in SMC, TVV and EVV to capture visits.

Module Objectives

After completing this lesson, you will be able to:

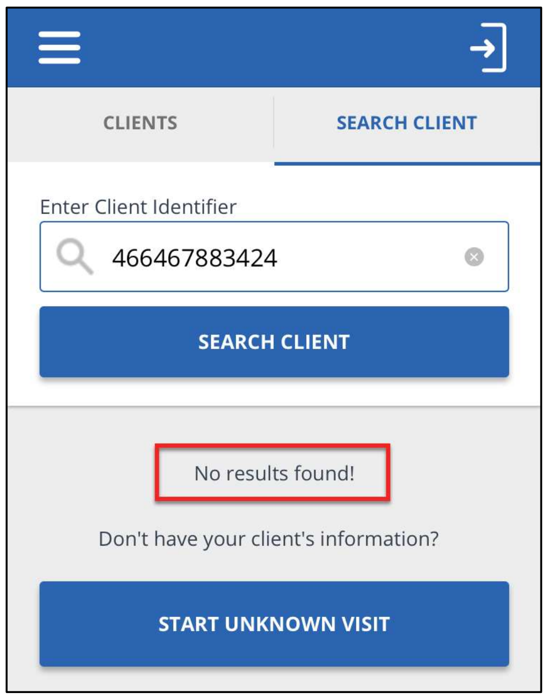
- start, join and end a group visit using SMC;
- start, join and end a group visit using TVV;
- search for group visits in EVV Visit Maintenance;
- create a group visit call in EVV Visit Maintenance; and
- edit/enter a group visit code for a visit.

The Group Visit option in the Sandata Mobile Connect application (SMC) and Telephony is intended to be used when one or more employees are providing like services to more than one individual at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

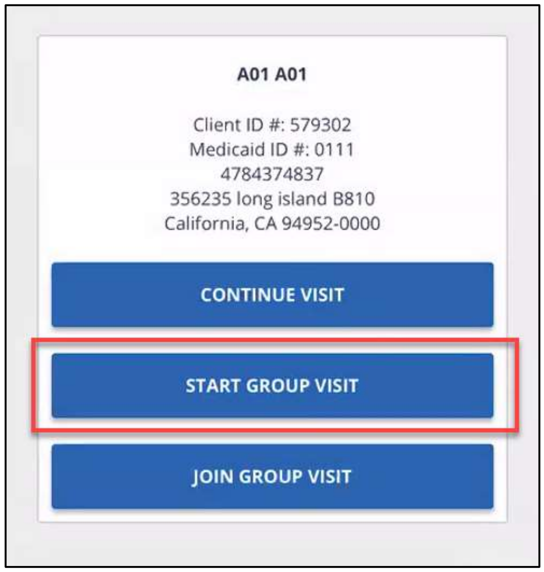
Group Visits using Sandata Mobile Connect

<u>Starting a new Group Visit</u>

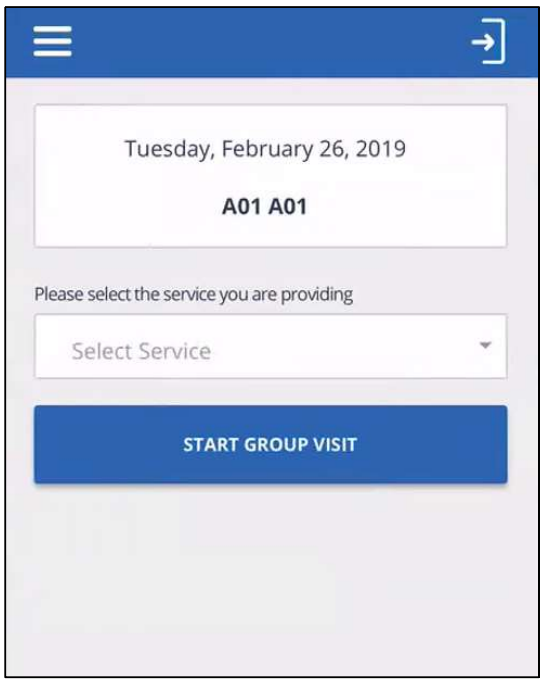
1. Log in to SMC.
2. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or Client ID of the client.
3. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a "No results found" message displays).



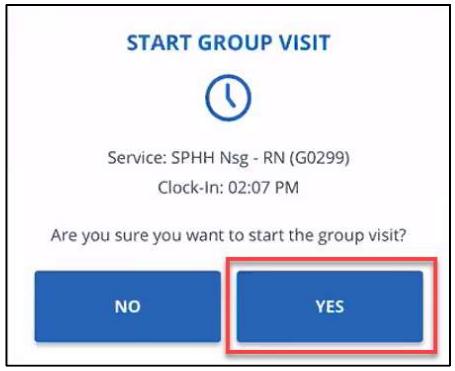
4. Tap **START GROUP VISIT.**



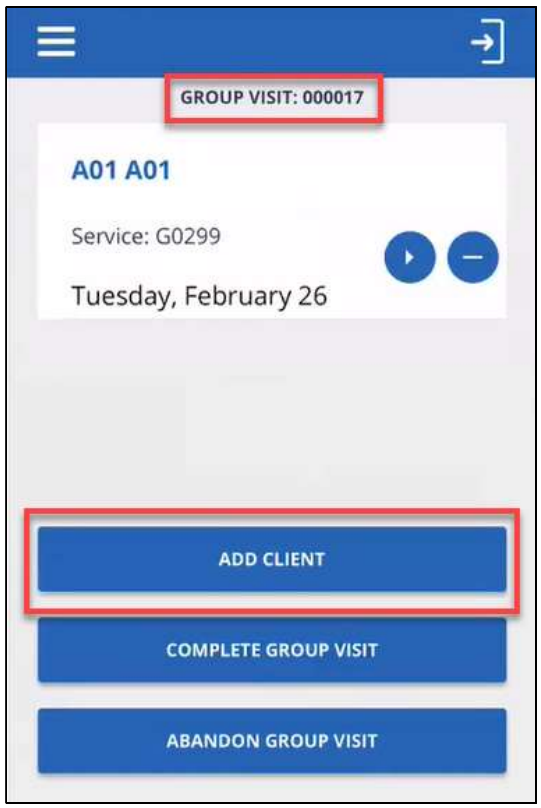
5. Select the appropriate Service from the drop-down list then tap **START GROUP VISIT.**



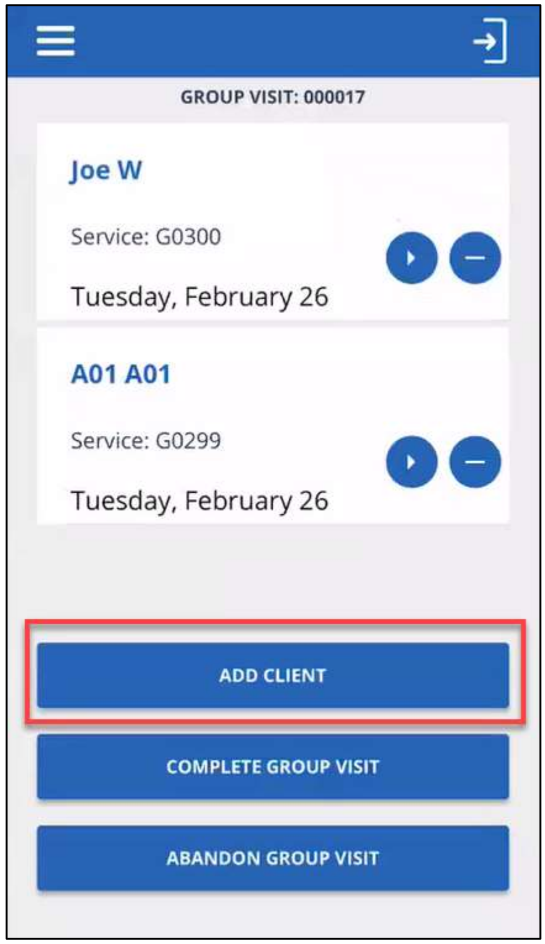
6. A confirmation screen displays asking you to confirm the start of the group visit. Tap **YES**.



The visit is in progress and a Group Visit code is generated. This 6-digit code is used to identify all clients at a location who are receiving care from one or more Non-Agency Providers. The Non-Agency Provider may add additional clients they are providing care for to the group visit.



7. Tap **ADD CLIENT** to search for additional clients to add to the group. Once added, the clients will appear on the Group Visit screen.



A Non-Agency Provider will only see the clients he or she added to the group visit, even if other Non-Agency Providers join the group and add clients.

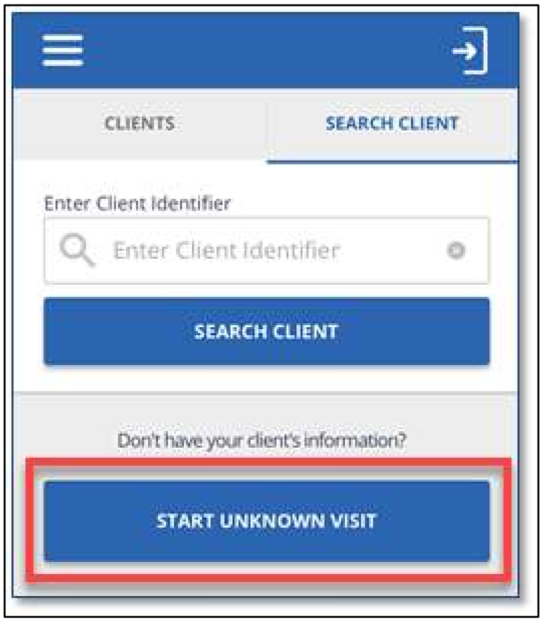
There is no limit to the number of known clients a Non-Agency Provider can add to a group visit, or the number of Non-Agency Providers who can join a group visit. However, a Non-Agency Provider can only add one unknown client to a group visit.

A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

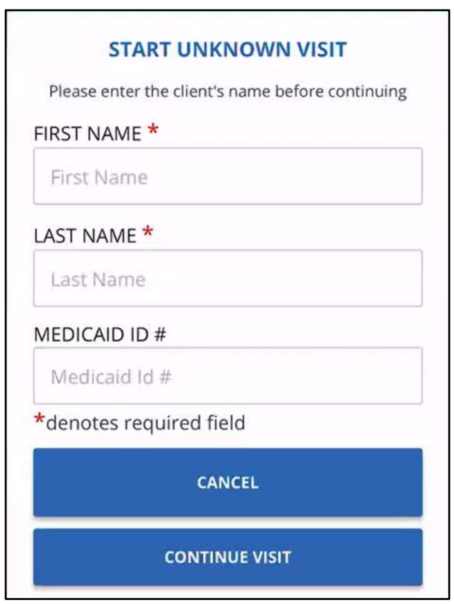
Adding an Unknown Client to a Group Visit

If the Medicaid ID or Client ID entered when searching for a client does not return any results, the Non-Agency Provider can add an unknown client to the group visit. A Non-Agency Provider can only add a maximum of one unknown client to a group visit.

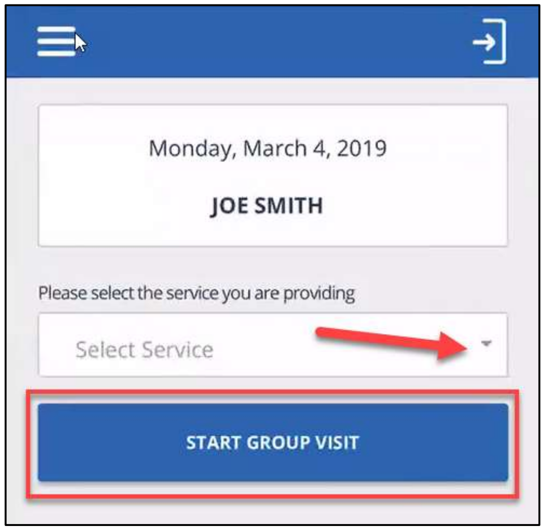
1. From the home screen, Tap **START UNKNOWN VISIT**.



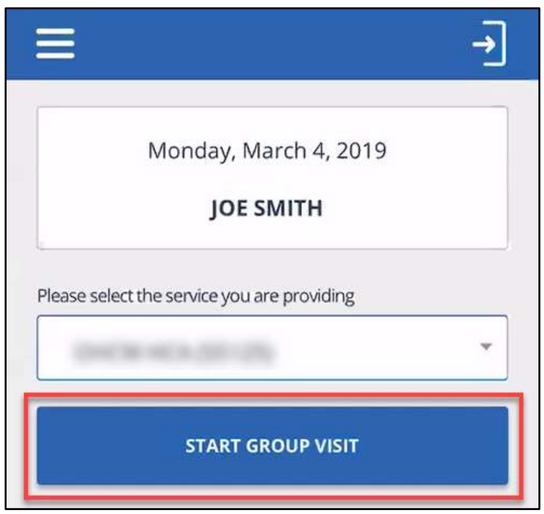
2. Enter the required information and tap **CONTINUE VISIT**.
   - **FIRST NAME** (Required)
   - **LAST NAME** (Required)
   - **MEDICAID ID #** (Optional – if available)



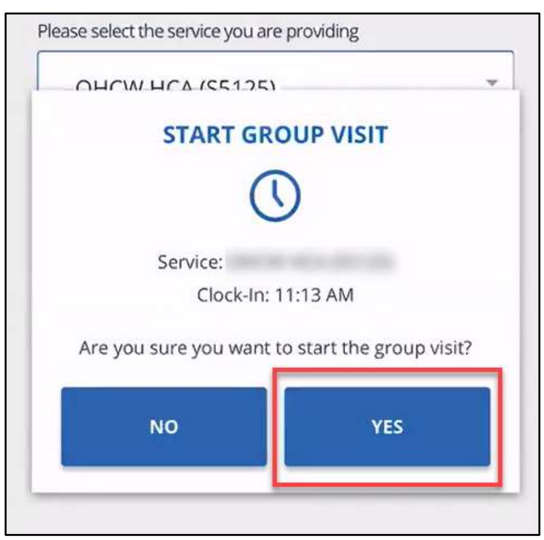
3. Select the Service from the drop-down list and tap **START GROUP VISIT**.



4. Tap **START GROUP VISIT** again.



4. Tap **YES** to confirm adding the unknown client to the group visit.



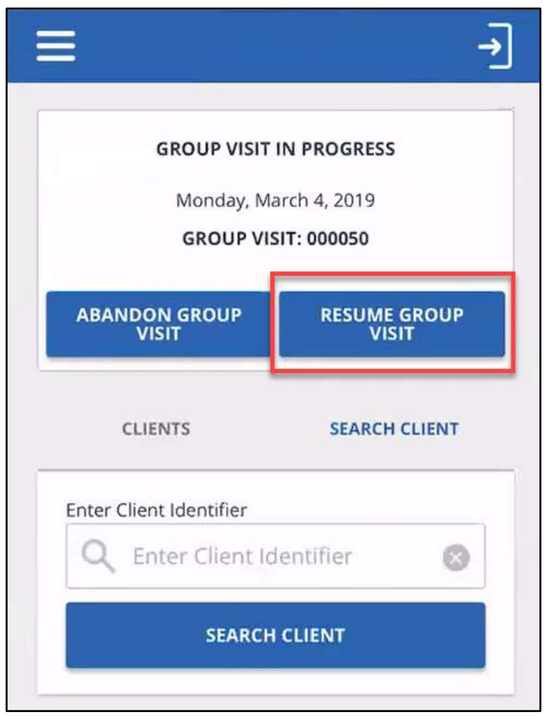
Completing a Group Visit

A Non-Agency Provider can complete his or her visits within a group individually or complete all visits within a group together.

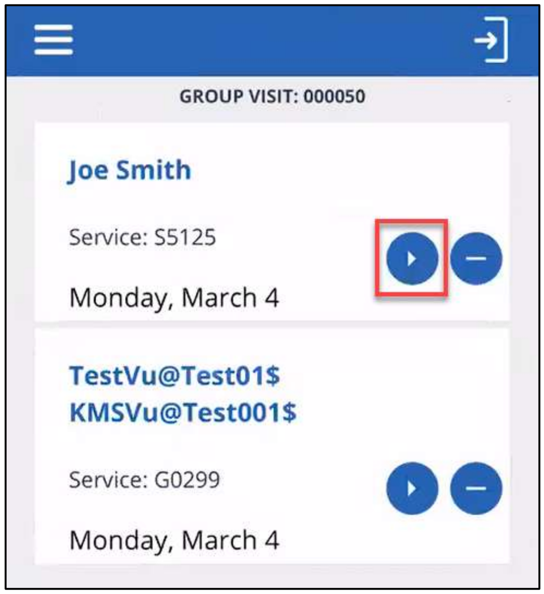
Completing all visits within a group at the same time requires that the visit process is the same for all the clients (e.g. all visits do not require client confirmation during the call-out process). If one or more clients have a different call-out process, the Non-Agency Provider must complete the visits individually.

Completing a visit within a Group Visit Individually

1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap the 'Play' icon ( ) on a visit to complete.

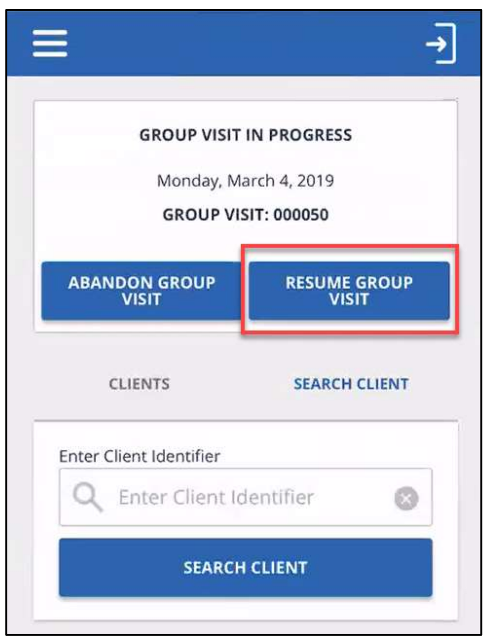


4. Complete the visit following the individual visit process.

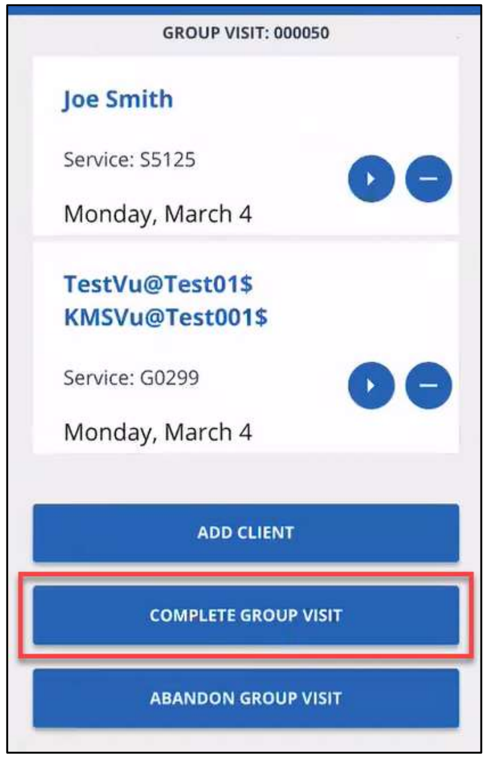
Tapping the 'dash' icon ( ) allows the Non-Agency Provider to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Completing all visits within a Group Visit Together

1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap **COMPLETE GROUP VISIT**.

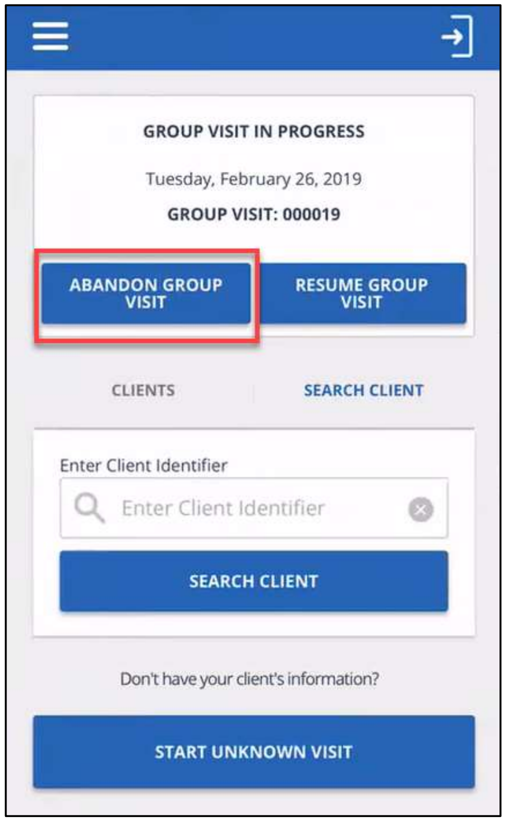


4. Tap **YES** to confirm completion of the group visit.

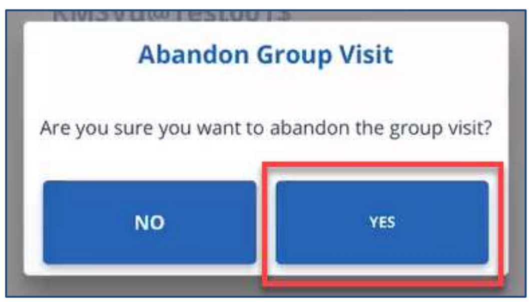
When completing a group visit, all of the visits within the group have the same visit end-time.

Abandoning a Group Visit

1. Log back in to SMC.
2. Tap **ABANDON GROUP VISIT**.



3. Tap **YES** to confirm abandoning the group visit.



When abandoning a group visit, all of the Non-Agency Provider's visits within the group appear in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Group Visits Using Telephonic Visit Verification

Call-In	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to the Santrax ID for the Non-Agency Provider, Santrax will say: " *You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes. Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
	Press 1 for Yes.
	Santrax will say: *"Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group visit menu."*
4	Press 1 to start a new group visit.
	Santrax will say: *"You will start a new group visit with group visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete a visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."*
5	Press 1 to add a client.
	Santrax will say*: "Press 1 to call-in or 2 to call-out."*
6	Press 1 to call-in.
	Santrax will say*: "Received at [Time]. Please enter first client ID or hang up if done."*
7	Enter the client ID for the first client being added to the group visit.
	Santrax will say: *"Enter second client ID or hang up if done."** *Repeat step 7 for each client being added to the group visit.
8	Hang up.

Call-Out	
1	Dial either English toll-free number.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to the Santrax ID for the Non-Agency Provider, Santrax will say: " *You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 1 for Yes.
	Santrax will say: *"Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group menu."*
5	Press 2 to continue the group visit.
	Santrax will say: *"Please enter the group visit code." ** *If the code entered is not valid, Santrax will say: *"You have entered an invalid visit code. Please try again."*
6	Enter the 6-digit group visit code.
	Santrax will say*: "You will continue the group visit with visit code [XXXXX]. Please press 1 to add a client to the group visit, 2 to complete visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."*
7	Press 2 to complete the visit.
	Santrax will say: *"Please select 1 to call-in or 2 to call out."*
8	Press 2 to call-out.
	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
9	Enter the client ID number.
	Santrax will say: "Please enter the Service ID."
10	Press the three-digit ID of the care performed.

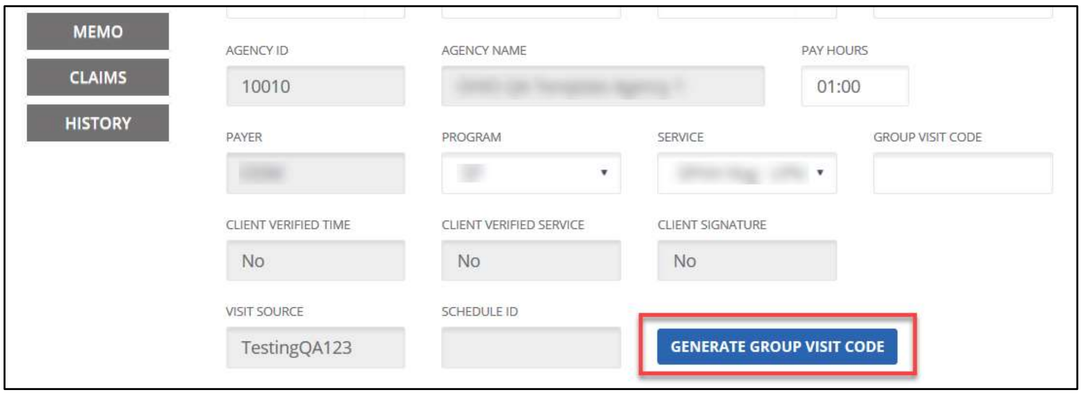
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
11	Press the 1 to accept.
	Santrax will say: "Enter second client ID or hang up if done." Enter the next client ID to complete from the group visit. **(repeat steps 9 – 11 for each additional client in the group)** Hang up when the last client has been entered.

Generating/Editing Group Visit Codes in Visit Maintenance

A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

Adding a Group Visit Code

If a visit that took place should have been captured as a group visit, a user can create a group visit code after the fact in Visit Maintenance. The group visit code can be generated from the *General* screen of the Visit Details by clicking the **GENERATE GROUP VISIT** button. This creates a 6-digit code and adds it to the **GROUP VISIT CODE** field.



Editing a Group Visit Code

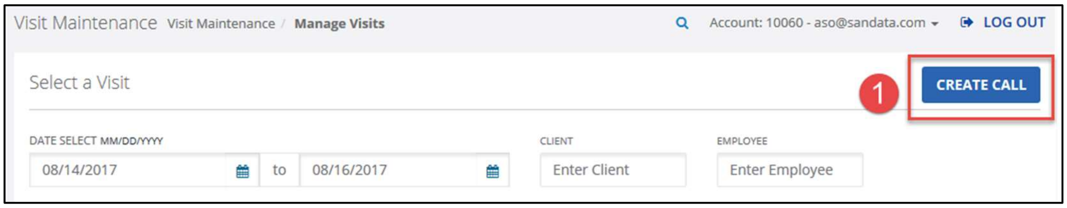
If a visit is linked to an incorrect group visit or was supposed to be part of an existing group visit, a user can edit the existing code in the **GROUP VISIT CODE** field on the General screen of the Visit Details.

If the code entered is not a valid group visit code, an invalid group visit code message displays.

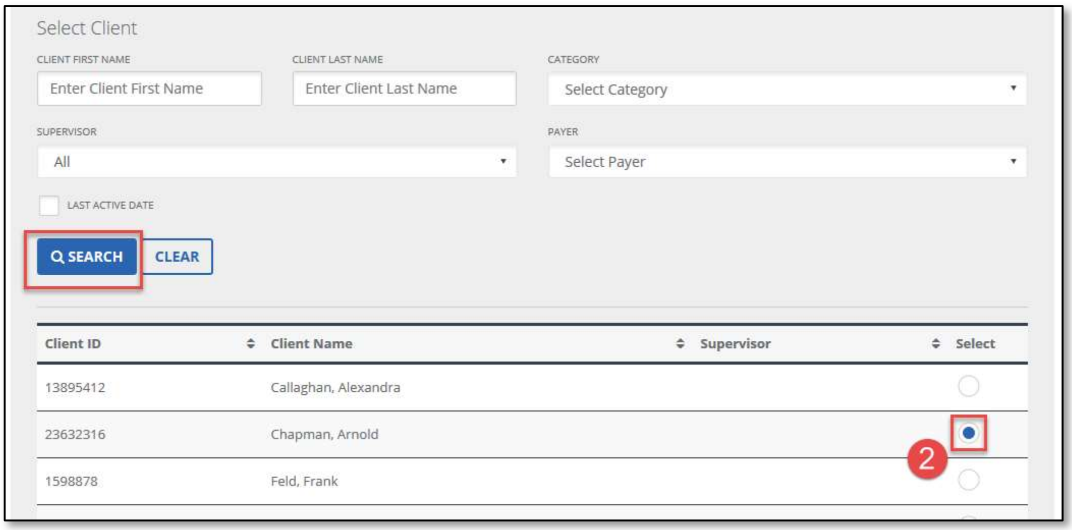
Creating a Manual Group Visit

The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred but the Non-Agency Provider did not call-in or call-out.

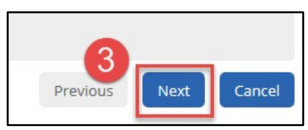
1. Click **CREATE CALL** on the *Visit Maintenance* screen.



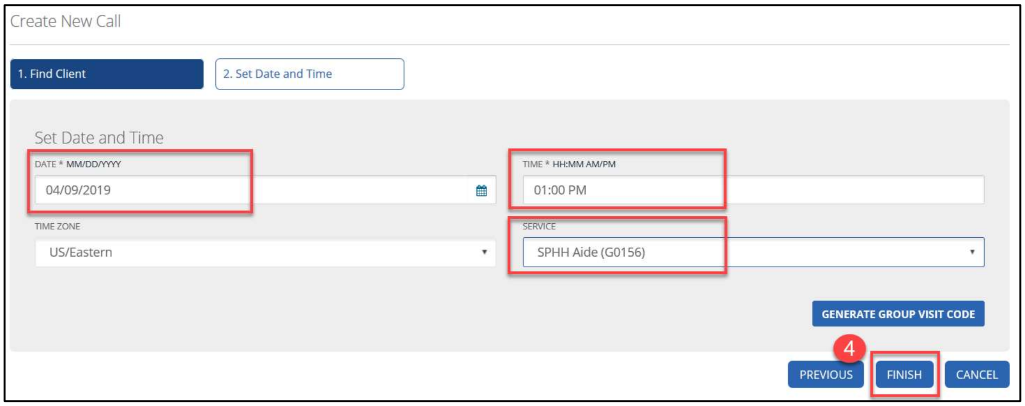
2. Search for and select a client.



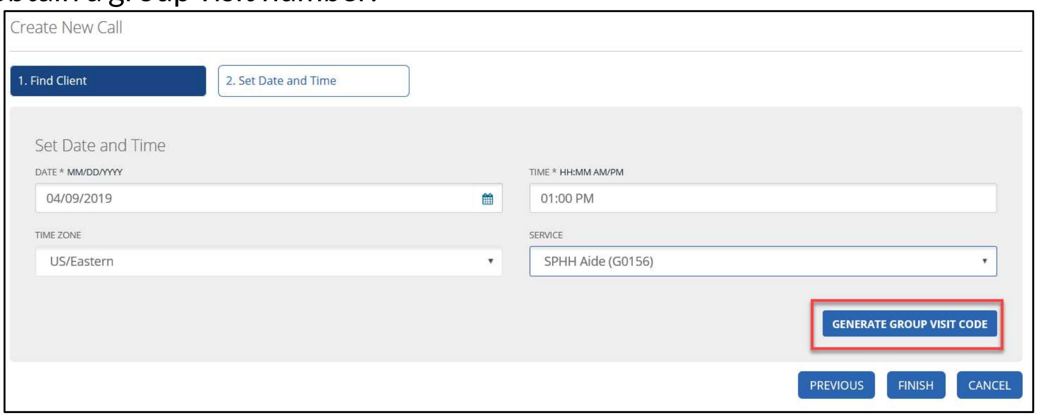
3. Click **Next.**

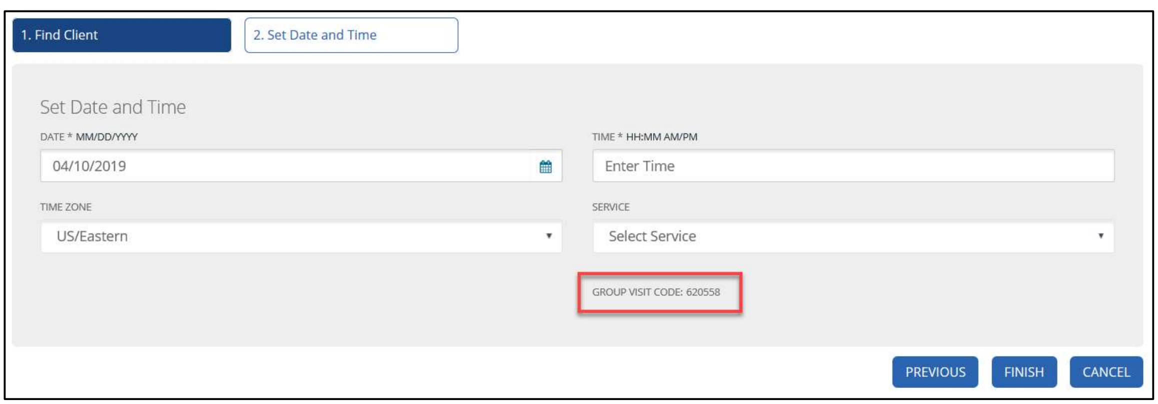


4. Enter the date, time and service details.



5. If creating a group visit call, click the **GENERATE GROUP VISIT CODE** button to obtain a group visit number.





6. Click **FINISH**.

9 Appendix

Glossary

A

Aggregator	A central data store for Sandata EVV and alternate data collection EVV systems.
Alternate EVV System	Any EVV system that is not Sandata's.

B

Bring Your Own Device	The term used for the option of an employee/Direct Care Worker choosing to use their personal mobile device to call-in and call-out for visits.

C

Client/Individual	A person who receives services through the Medicaid program.

D

DAS	Department of Administrative Services.
Dashboard	Real-time status of the current day's visit exceptions.
DCW	Direct Care Worker.
DODD	Department of Developmental Disabilities.

E

EVV	Electronic Visit Verification.
Exception	Any visit data which Sandata EVV has denoted with a colored circle because it is either missing information or does not meet the rules established for the program.

I

Individual/Client	A person who receives services through the Medicaid program.

M

Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
MCO	Managed Care Organization.
MITS	Medicaid Information Technology System – Ohio's claims adjudication system, which is managed and operated by DXC Technology.

N

NAP	Non-Agency Provider. An individual worker providing care to clients.

O

ODA	Ohio Department of Aging.
ODM	Ohio Department of Medicaid.
ODM EVV	All parts of Sandata's EVV solution—provider portal, EVV technologies and Aggregator.
OHCW	Ohio Home Care Waiver.

P

PDN	Private Duty Nursing.
Privilege	A single permission.

R

Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV.

S

Sandata EVV	Sandata's Electronic Visit Verification system.
Security	The module in Sandata EVV where users (office staff) are set up to use the system.
Sandata Mobile Connect	Sandata's Mobile Visit Verification application.

T

Telephonic	The system used to record calls for visits.
Telephony (TVV)	The use of a telephone to record visit data and verification when SMC is not available.

U

User	A person with a unique login and password to Sandata EVV
Username	The user's email address.

V

Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged.

Contact Information

- EVV Provider Hotline number 855-805-3505
- EVV Provider Hotline email ODMCustomerCareEmail@sandata.com